STRATEGIC PLAN

PORT OF SAN FRANCISCO

PORT OF SAN FRANCISCO

Final Presentation And Appendix Of Key Data

April 23, 1990

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In assisting the Port develop a strategic plan, Cresap has several critical tasks:

- To facilitate community involvement
- To identify, gather, and assess existing data relevant to developing the Port's strategic plan
- To build as much consensus as possible within the Port and its community on the Port's future direction

Cresap used a wide variety of information sources

- Past studies and other relevant documents
- Tour of all facilities
- Opinion survey administered to 157 people
- Two rounds of focus groups totaling 56 people
- One hundred and six individual interviewees

Note: The appendix lists all studies and documents reviewed.

Strategic Planning Advisory Panel members coordinated focus group meetings to address a number of stakeholder issues

	Round #1	Round #2
Focus Groups Involved	■ Environmental groups ■ Fishing industry ■ Ferry operations/excursion vessels ■ Marine cargo ■ Northern waterfront neighborhood groups ■ Organized labor ■ Retail/commercial tenants ■ Ship repair	■ All groups included in Round #1 plus: ▨ Port middle management ▨ Southern waterfront neighborhood groups
Key Agenda Items	■ Introduction to strategic planning process ■ Alternate missions/roles for the Port ■ Port performance - criteria and grades ■ Key stakeholders	■ Briefing on study progress ■ Discussion of key issues and findings ■ Reactions to alternative mission/goals for the Port

We have captured significant breadth, depth, and expertise through our interviews

Organization/Group	Number Of Interviewees
State Lands	4
Port Commissioners	5
BCDC	7
City Government	11
Maritime Interests	19
Port Staff	32
Other Experts/Interested Parties	28
Total	106

Note: A complete list of interviewees, including focus group members, is shown in the appendix.

Next Steps

February 20

Advisory Panel Meeting

- Recap project progress
- Review key issues and findings
- Discuss alternative directions and make recommendations to Port management

March 9 -10

Port Senior Management Offsite

- Review key issues and findings
- Review SPAP recommendations
- Prepare recommendations on mission, goals, and objectives for Port Commission

March/April

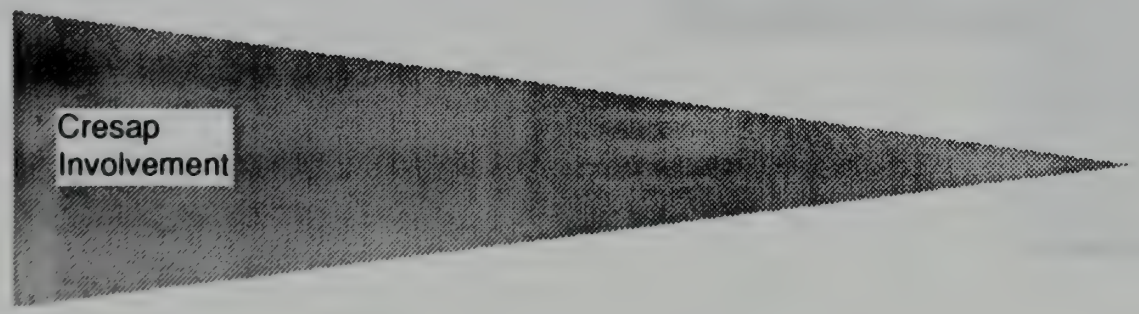
Commission Meeting

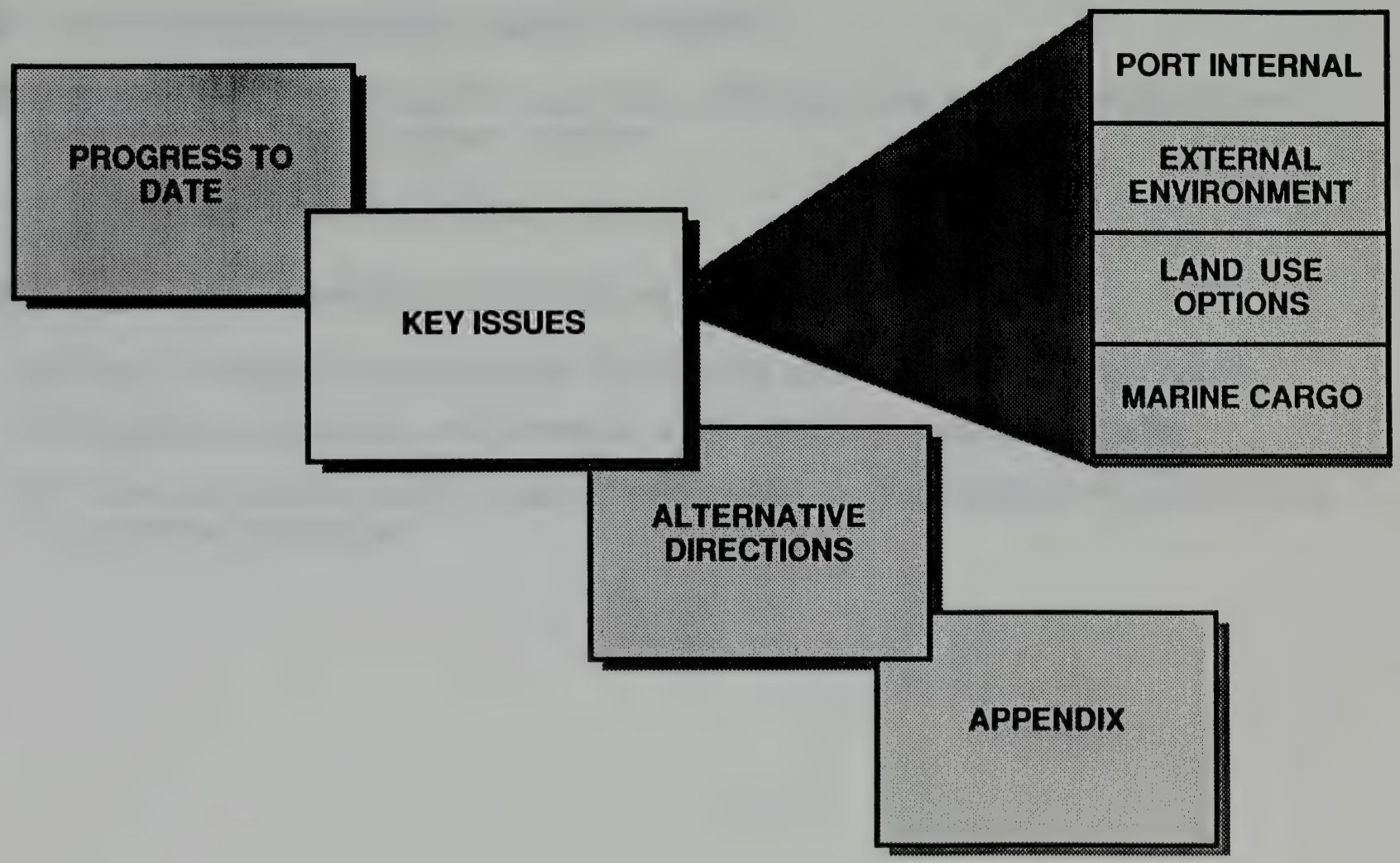
- Receive Port management recommendations on mission, goals, and objectives
- Hear public comments
- Adopt Port mission, goals, and objectives

Ongoing

Implementation of Strategic Plan

- Develop tactics
- Assign responsibility and time lines for each tactic
- Implement tactics

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The Port has not established or communicated a clear direction and set of priorities

- The Port has no explicit mission and goals
- Stakeholders, including Port and City officials, have widely varying views regarding the Port's current mission
  - Many could not identify any mission
- Implicit mission seems to have three key components:
  - First, to support and promote the import and export of marine cargo
  - Second, to support and promote other maritime-related activities
  - Third, to pursue commercial development for the purpose of subsidizing maritime industries

Port Revenues

	$ (000)	
Maritime		
Dockage, wharfage, demurrage & crane rental	$ 8,185	
Cargo Facilities	901	
Marine Cargo Property Rental	526	
Ship Repair	2,130	
Other Maritime Property Rental	1,676	
Subtotal	13,418	40% Of Revenue From Maritime Uses
Property		
Rental	14,286	
Power	954	
Parking	2,800	
Subtotal	18,040	50% Of Revenue From Non-Maritime Uses
Maintenance		
Tenant Services	75	
Finance		
Interest	3,478	10% Of Revenue From Interest
Other	365	
Subtotal	3,843	
TOTAL REVENUE	$35,376	

Note: Based on 1989/90 budget and Cresap analysis of property rentals.

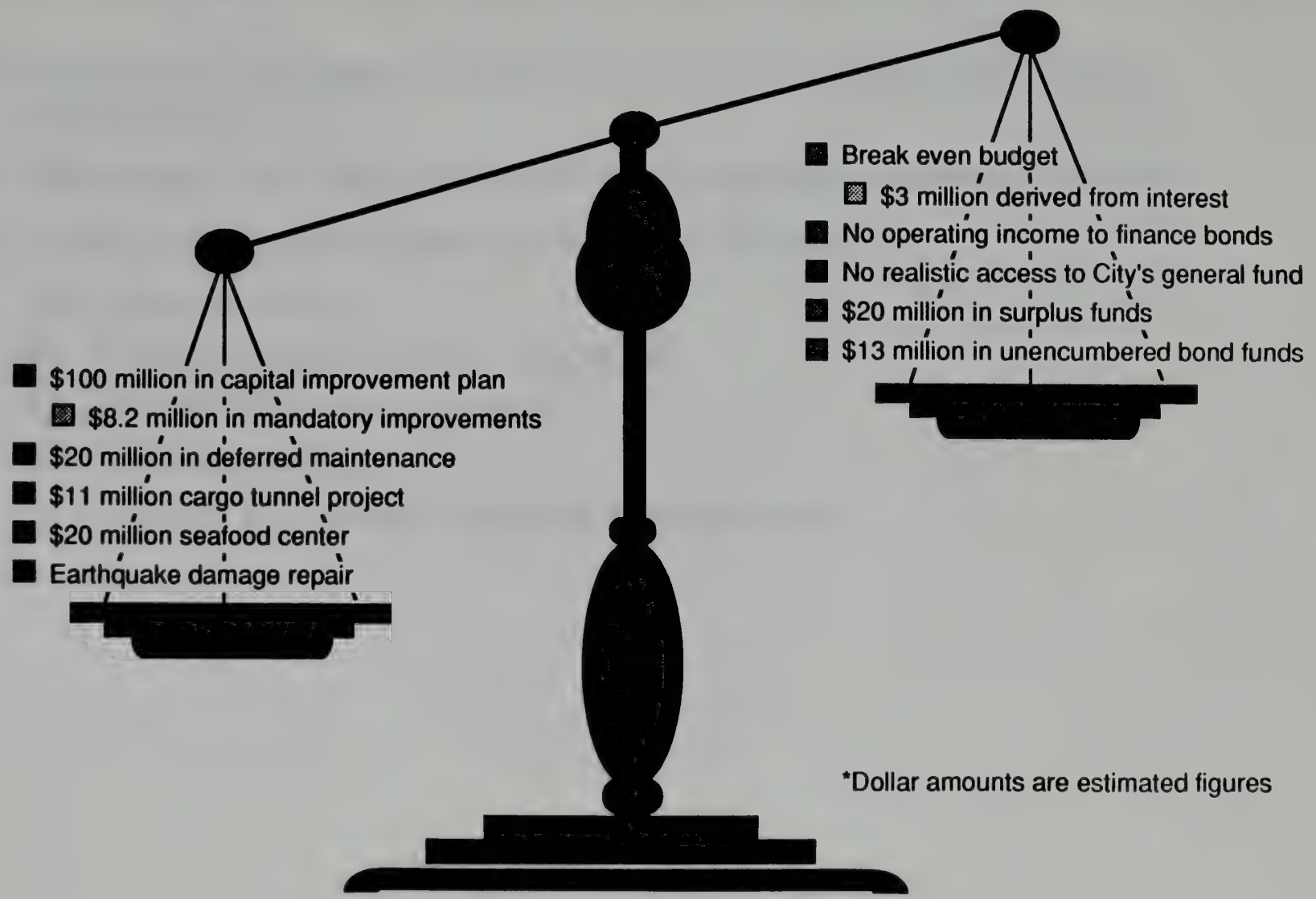
Port Expenses

	$ (000)	
Personnel	$14,522	42% Of Expenses
Debt Service	9,813	28% Of Expenses
Services From Other City Departments	4,175	Substantial Contribution To The City (14% Of Expenses)
City Overhead	675	
Current Services	1,576	
Professional Services	1,164	
Materials And Supplies	847	
Other	2,143	
Subtotal	$34,915	Roughly Break-even with Revenues

Note: Based on 1989/90 budget.

INTERNAL – FINANCIAL HEALTH

When capital requirements are factored in, the Port finds itself in a tenuous financial position



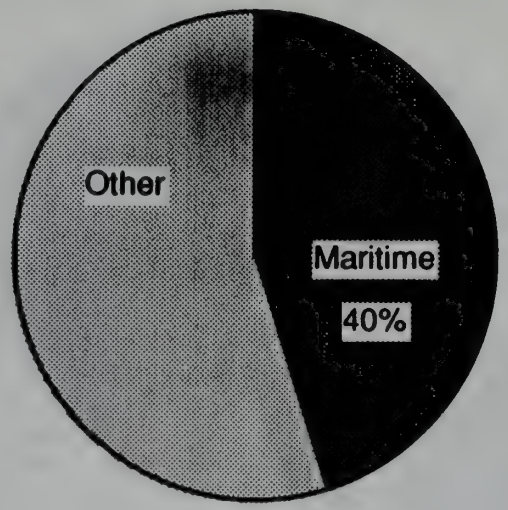
*Dollar amounts are estimated figures

The Port's internal management structure and processes are in need of further refinement

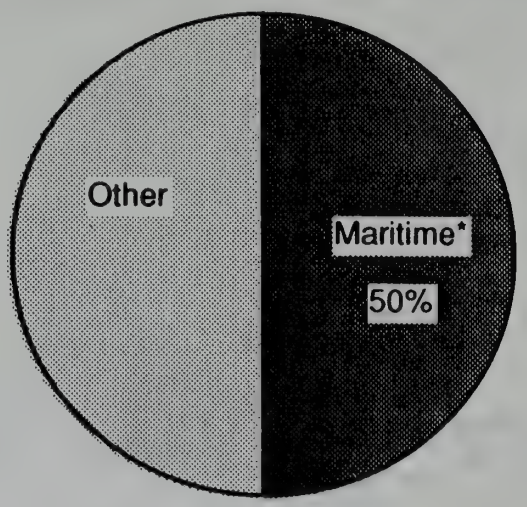
- Eliminating unnecessary conflict between the maritime and property departments
- "Rightsizing" the organization and clarifying roles and responsibilities
- Enhancing key management processes; for example:
  - Cost accounting
  - Preventive maintenance programs
  - Performance measurement
  - Capital planning
  - Property and tenant database management

INTERNAL - CURRENT LAND USE

In terms of revenue, land use, and tenant mix, the Port is not predominately maritime

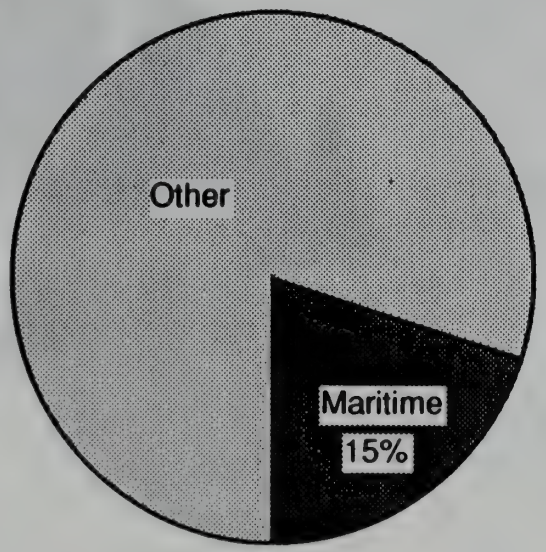


Revenue Sources



Land Use
(square feet)

* Does not include unused land reserved for maritime uses

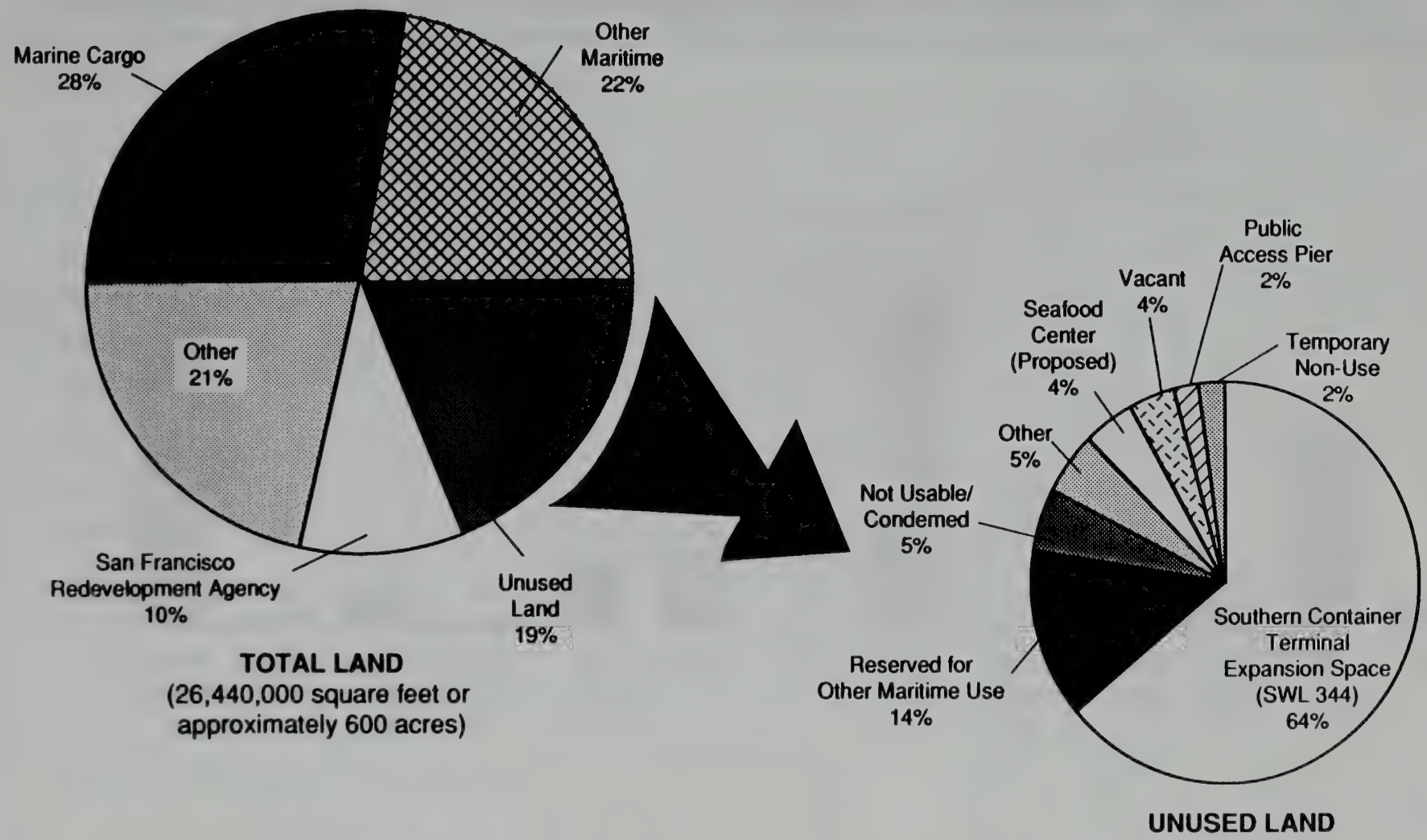


Tenant Mix

Source: Port of San Francisco 1989

INTERNAL - CURRENT LAND USE

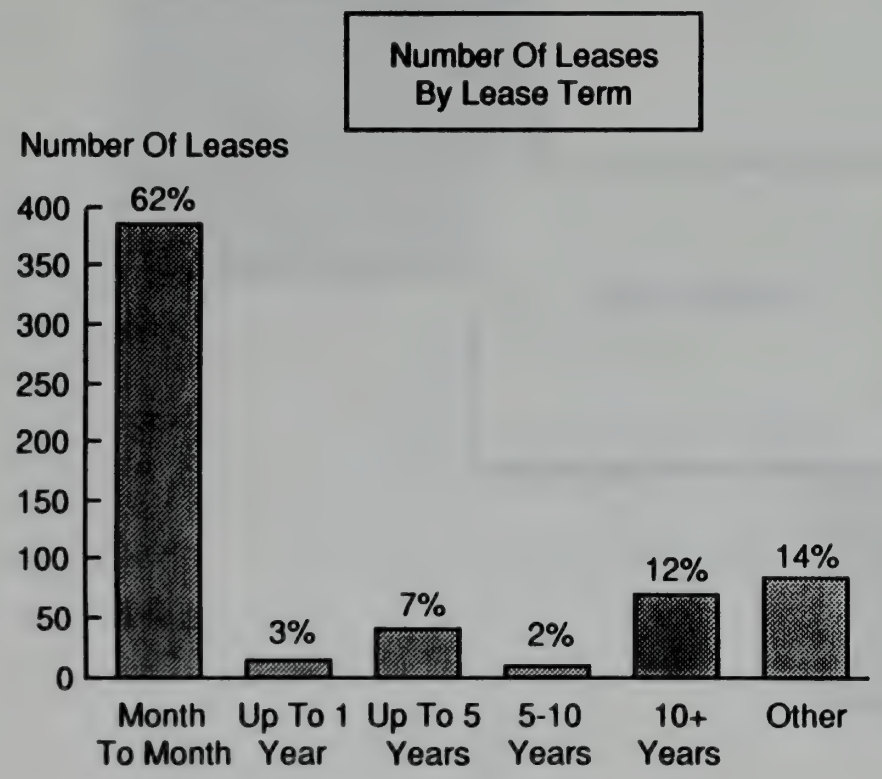
Nearly one-fifth of the Port's land is currently unused

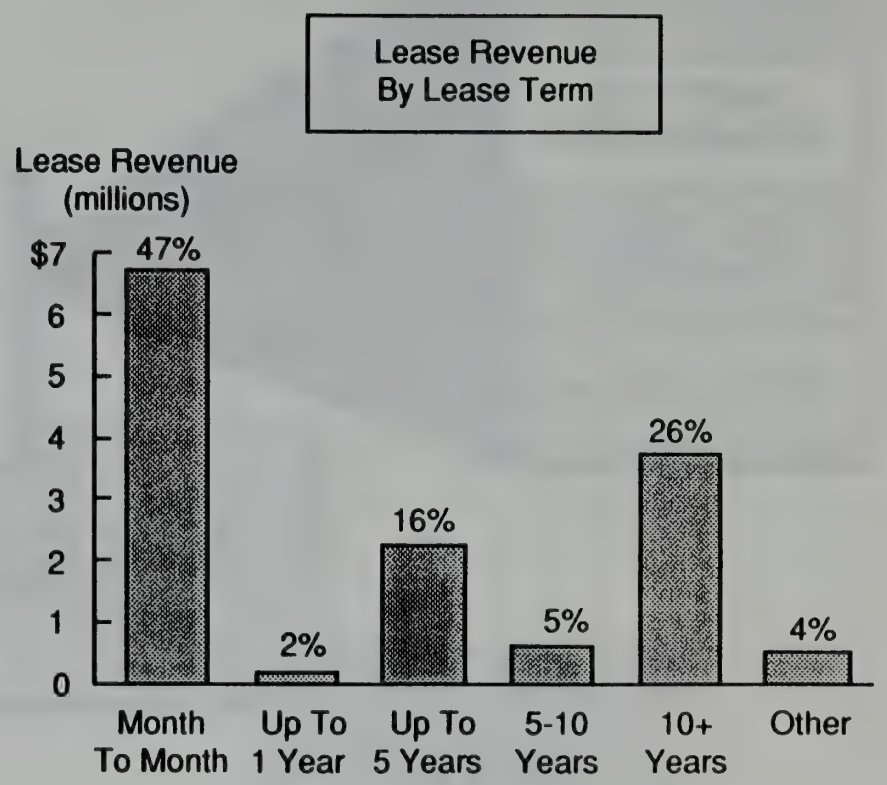


Source: Port of San Francisco 1989

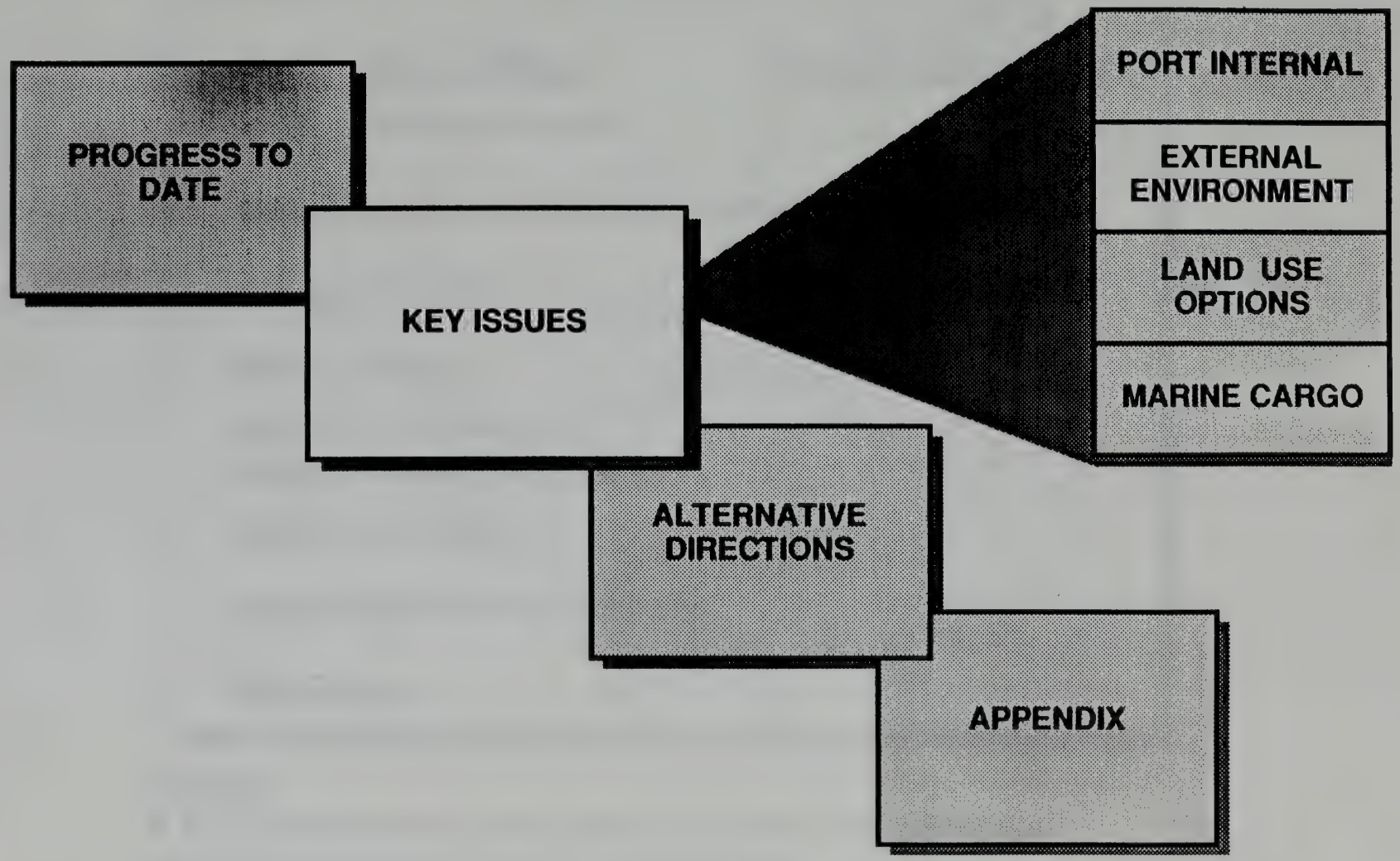
INTERNAL - CURRENT LAND USE

The Port has a substantial opportunity to enhance its revenues in the short-term since over 60% of the Port's leases representing nearly 50% of total lease revenue are month-to-month licenses





Source: Port of San Francisco 1989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The Port's credibility among key stakeholders is low; however, there is widespread optimism about the Port's future

EXTERNAL - STAKEHOLDERS

Focus Group	Overall Port Performance Grade*
Environmental Groups	D
Ferry Operations/Excursion Vessels	C/C–
Fishing Industry	D
Marine Cargo	C–
Northern Waterfront Neighborhood Groups	C–
Organized Labor	F
Retail/Commercial Tenants	D
Ship Repair	C–

Optimism

- Strong confidence in and support for the Port's senior leadership
- Strong consensus for change, not status quo
- Honeymoon period for Port senior leadership is nearing an end; action must be taken soon

*These grades are consistent with comments made in individual interviews.

EXTERNAL - STAKEHOLDERS

To improve credibility, the Port must improve its performance in five key areas:

- Responsiveness
- Effectiveness
- Maintenance/look of facilities
- Quality of management/staff
- Establishing a direction

EXTERNAL - LEGISLATIVE ENVIRONMENT

Although minor adjustments may be possible, the Port's legislative environment will not change in the near term

Legislative Environment Components	Reasons Why Unchangeable	Possible Minor Adjustments
BCDC	■ State law ■ McAteer-Petris Act widely supported ■ Adversarial relationship	■ BCDC work program provides for periodic review of specific policy interpretations
State Lands	■ State law and constitutionally based ■ Difficult to change ■ Public trust law widely supported	■ Broader definitions of guiding policies; often follow lead of BCDC
City and County of San Francisco	■ City Charter and state law (Burton Act) ■ Port's performance has political impact on elected city officials ■ Mistrust of the Port	■ Informal (as opposed to legally mandated) roles must still be clearly defined ▩ Especially for planning function
Regional Port Authority	■ No agreement between key organizations: State, Port of SF, Port of Oakland	■ Regional initiatives on an issue by issue basis are supported and possible ■ Opportunities with new leadership in Oakland
Port/SFO Merger	■ Lack of interest from SFO ■ Legal difficulty ■ Little synergy in seaport and airport businesses	■ Specific joint interest projects are supported and possible ▩ Heliport ▩ Cruise ship passengers ▩ Water transit to/from SFO

Although the current legislative environment is restrictive, the Port must work within it

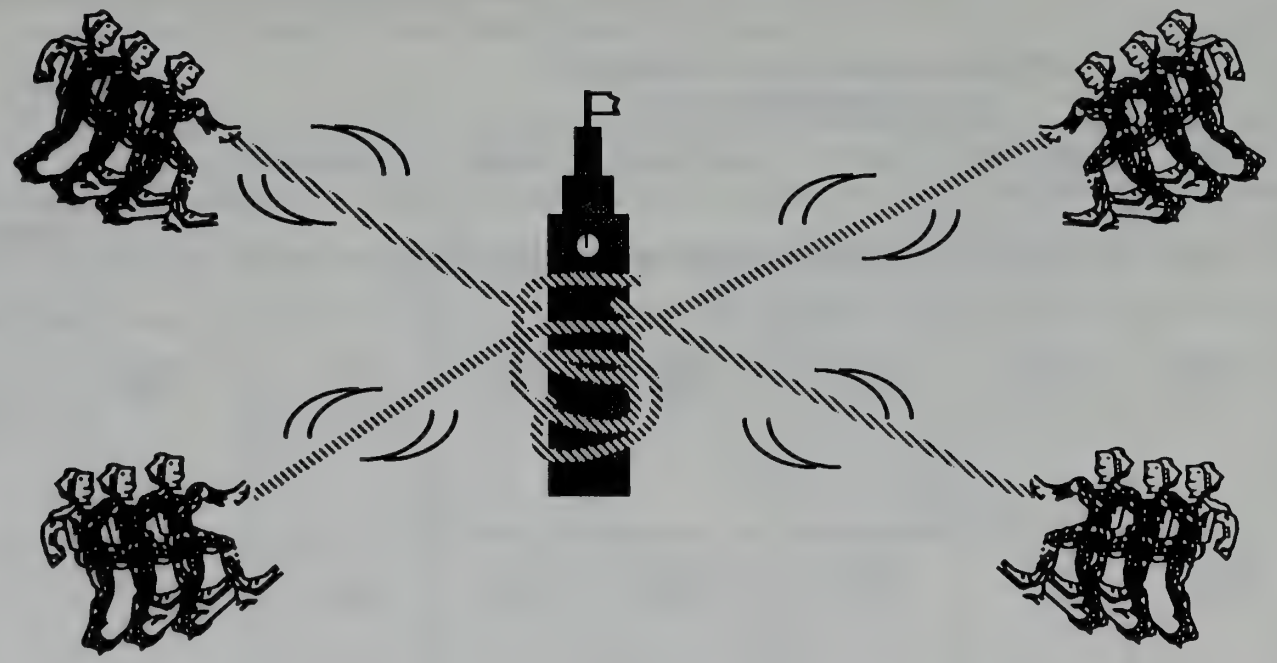
- The Port does not currently have the authority, credibility, or political support to bring about substantive changes in its legislative environment
- The Port can get things done without changes in the legislative environment
  - The "Special Area Plan" concept can serve as an umbrella for land use planning
  - A number of land uses are acceptable by BCDC and State lands

Land Use Regulatory Acceptability

Highly Acceptable	Acceptable Under Certain Circumstances	Unlikely To Be Acceptable
Cruise Ships	Convention/Exhibition	Housing
Dedicated Public Access	Hotels	Light Industrial
Ferries	Incidental Office	General Office
Fisheries	Parking	
Marine Cargo	Restaurants	
Recreation	Retail	
Ship Repair		

EXTERNAL - POLITICAL ENVIRONMENT

An energetic and complex political environment means that most Port actions are likely to be challenged



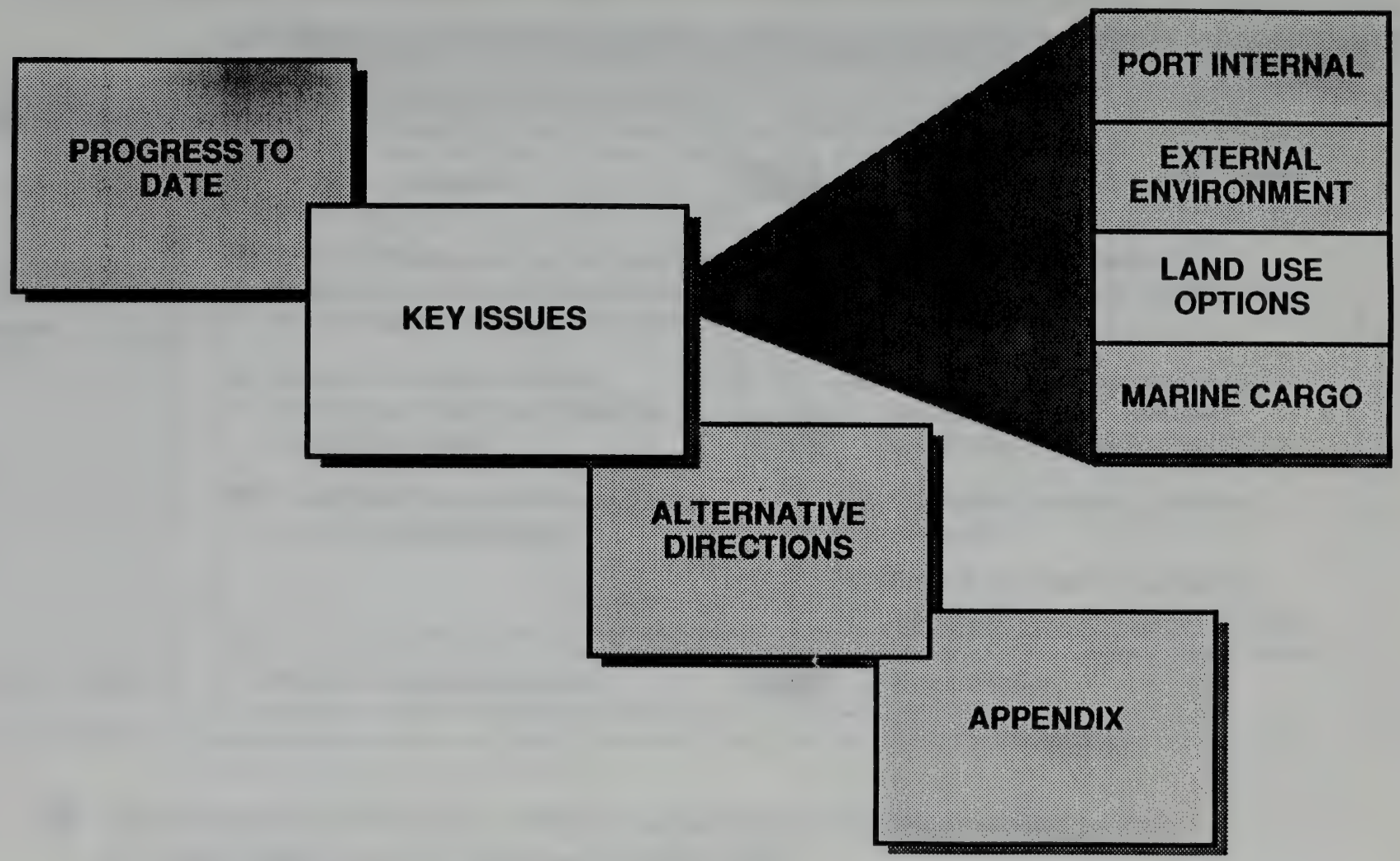
- Over 50 different stakeholders
- City government cannot be viewed as a single stakeholder
  - Mayor, Board, Planning. . .
- More energy is focused on preventing Port action than initiating/supporting it
- Many stakeholders have mutually exclusive goals

Despite widespread disagreement on specific Port actions, five overall imperatives emerged from the stakeholder analysis

EXTERNAL - POLITICAL ENVIRONMENT

Imperatives	Percent of Survey Respondents Who Agree or Strongly Agree							
	Employees	Environment	Ferries	Marine Cargo	N. Water	Org. Labor	Retail	Ship Repair
■ Balanced/Mixed Land Use	From Interviews/Focus Groups							
■ Economic Development* (Jobs and City Tax Revenue)	92	80	80	80	100	100	80	100
■ Maritime Orientation*	89	80	100	80	100	83	100	100
■ Public Access*	69	100	80	40	86	100	100	100
■ Regional Cooperation*	77	100	100	80	100	86	83	100

* Also highly supported in interviews/focus groups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Land use options were assessed as part of developing a realistic new direction for the Port

	Strategic Land Use Options Assessment	Tactical Land Use Planning
Timing	Completed	Next Steps
Objectives Of Land Use Analysis	■ Identify development options which are feasible given market opportunities and the political/regulatory environment ■ Assess fit between feasible development options and desired mission and goals ■ Determine the potential impact of the Port's development options	■ Identify specific development opportunities which the Port should pursue ■ Determine which development options will best promote the established mission and goals ■ Capitalize on existing plans and processes ■ Project the expected impacts of specific development project ideas
Ultimate Rationale	Establish A Realistic Direction	Develop Tactics

■ More detailed analysis will be required to develop tactics and site-specific land use recommendations

Fifteen potential land use options were analyzed in terms of likelihood of success and potential impact

Land Use Options

- Convention/Exhibition
- Cruise Ships
- Dedicated Public Access
- Ferries
- Fisheries
- Hotels
- Housing
- Light Industrial
- Marine Cargo
- Office
- Parking
- Recreation
- Restaurants
- Retail
- Ship Repair

Likelihood of Success

- Regulatory Acceptability
- Political Support
- Market Opportunity

Potential Impact

- Economic Development
- Financial

Maritime- and recreation-related land use options have greater political support and regulatory acceptability

Land Use Groupings	Land Use Options	Political Support	Regulatory Acceptability
Maritime	■ Cruise Ships	High	High
	■ Ferries	High	High
	■ Fisheries	High	High
	■ Marine Cargo	High	High
	■ Ship Repair	High	High
Recreation	■ Dedicated Public Access	High	High
	■ Recreation	High	High
Commercial Recreation	■ Convention/Exhibition	Low	Medium
	■ Hotels	Medium	Medium
	■ Restaurants	Medium	Medium
	■ Retail	Medium	Medium
Other	■ Housing	Low	Low
	■ Light Industrial	Low	Low
	■ General Office	Medium	Low
	■ Parking	Medium	Medium

Key:	Political Support	Regulatory Acceptability
	High - Strong support among stakeholders	High - Acceptable under current regulations
	Medium - Roughly equal support and opposition	Medium - Acceptable under certain circumstances
	Low - Much stronger opposition than support	Low - Unlikely to be acceptable under current regulations

Note: Based on surveys, interviews, and focus groups

Cresap used the market approach to determine the maximum potential impact of land use options

Possible Approaches

Market Approach

- Identify market characteristics
  - Demand growth
  - Competition
  - Port advantages and disadvantages

- More realistic
- Avoids unnecessary trade-offs with other land use options
- More proactive; keeps Port in touch with markets

Available Land Approach

Identify maximum amount of land available for land use options

- Unrealistic
- Makes stakeholders nervous
- Leads to unreachable goals and inevitable disappointment

↓

Determine maximum Port opportunity

↓

Determine maximum potential impact on:

- Port finances
- Jobs
- City tax revenues

LAND USE OPTIONS

No single feasible land use development option can have a dramatic financial or economic development impact over the next five years

Land Use Options	Maximum Additional Net Revenue In Fifth Year* (Thousands)	Maximum Economic Development Impact in 5th Year: Jobs Added	Maximum Economic Development Impact in 5th Year: City Taxes/Year (Thousands)
Convention/Exhibition	$ 600	100	$ 350
Cruise Ships	450	450	100
Dedicated Public Access	0	50	0
Ferries	50	50	50
Fisheries	300	350	100
Hotels	950	350	750
Marine Cargo	0	200	50
Office	1,100	1,300	450
Parking	1,800	50	50
Recreation	0	50	0
Restaurants	3,200	1,400	600
Retail	900	250	100
Ship Repair	0	0	0
Maximum Total	$ 9,350	4,600	$ 2,600
Summary: At the end of five years no single option will:	Increase net revenue by more than 9%	Increase Port-created jobs by more than 9%	Increase Port-created City tax revenue by more than 15%

*Assumes current business practices.

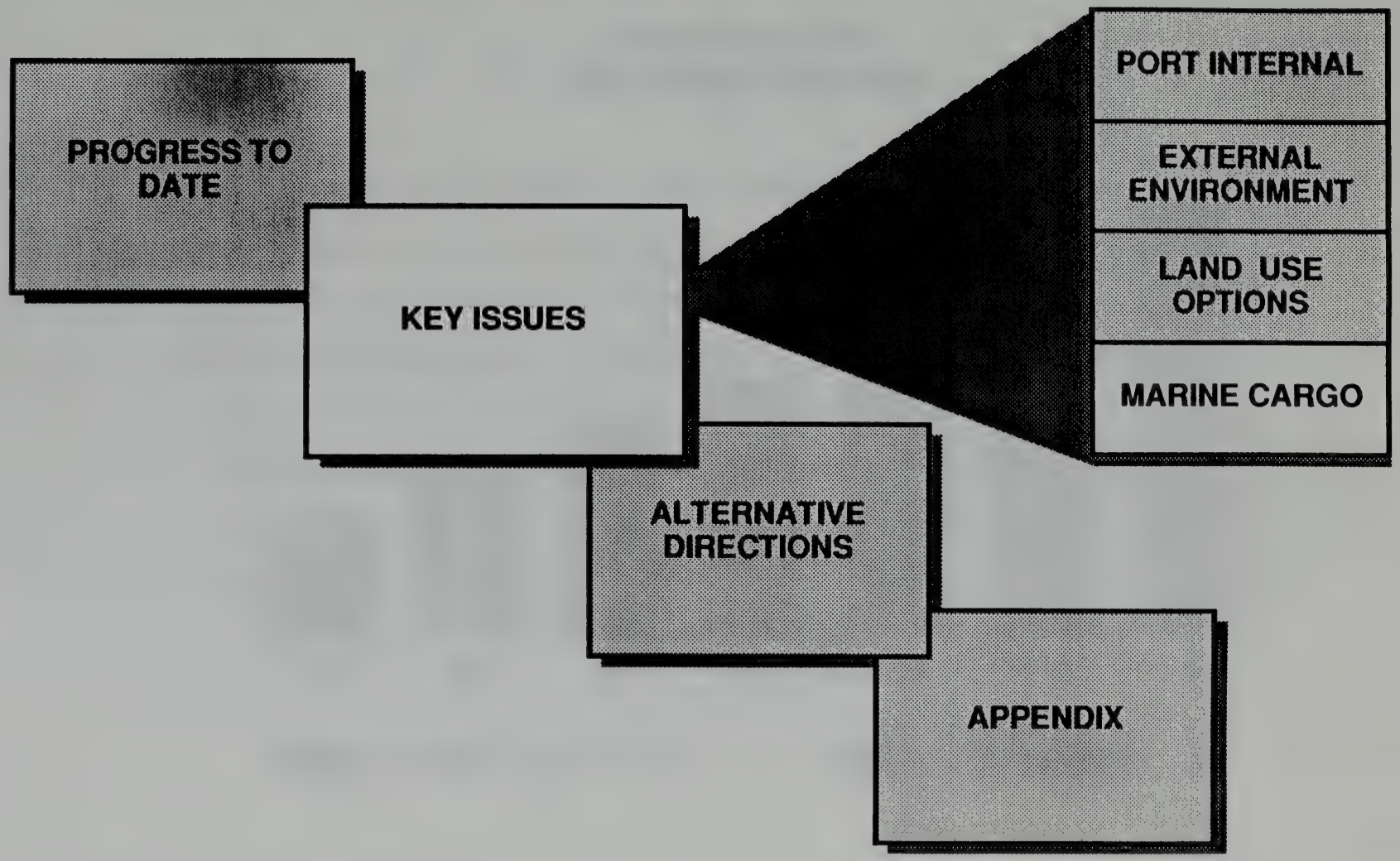
Even if they were feasible, housing and light industrial land usage would not have significant financial/economic impacts on the Port

Land Use Option	Maximum Additional Net Revenue In Fifth Year* (Thousands)	Maximum Economic Development Impact In Fifth Year	
		Jobs Added	City Taxes/Year (Thousands)
■ Housing	$2,500	0	$950

- Waterfront housing is not allowable under current regulations
- Housing on Port property is not politically supported
- Other probable requirements, such as providing low income housing may make housing a poor financial investment for the Port

Land Use Option	Maximum Additional Net Revenue In Fifth Year* (Thousands)	Maximum Economic Development Impact In Fifth Year	
		Jobs Added	City Taxes/Year (Thousands)
■ Light Industrial	$600	450	$100

- Non-maritime industrial usage of Port property is not allowable under current regulations
- Industrial use of the Port's land is not politically supported
- Growth is unlikely since industrial tenants have recently been relocating to less expensive facilities outside of San Francisco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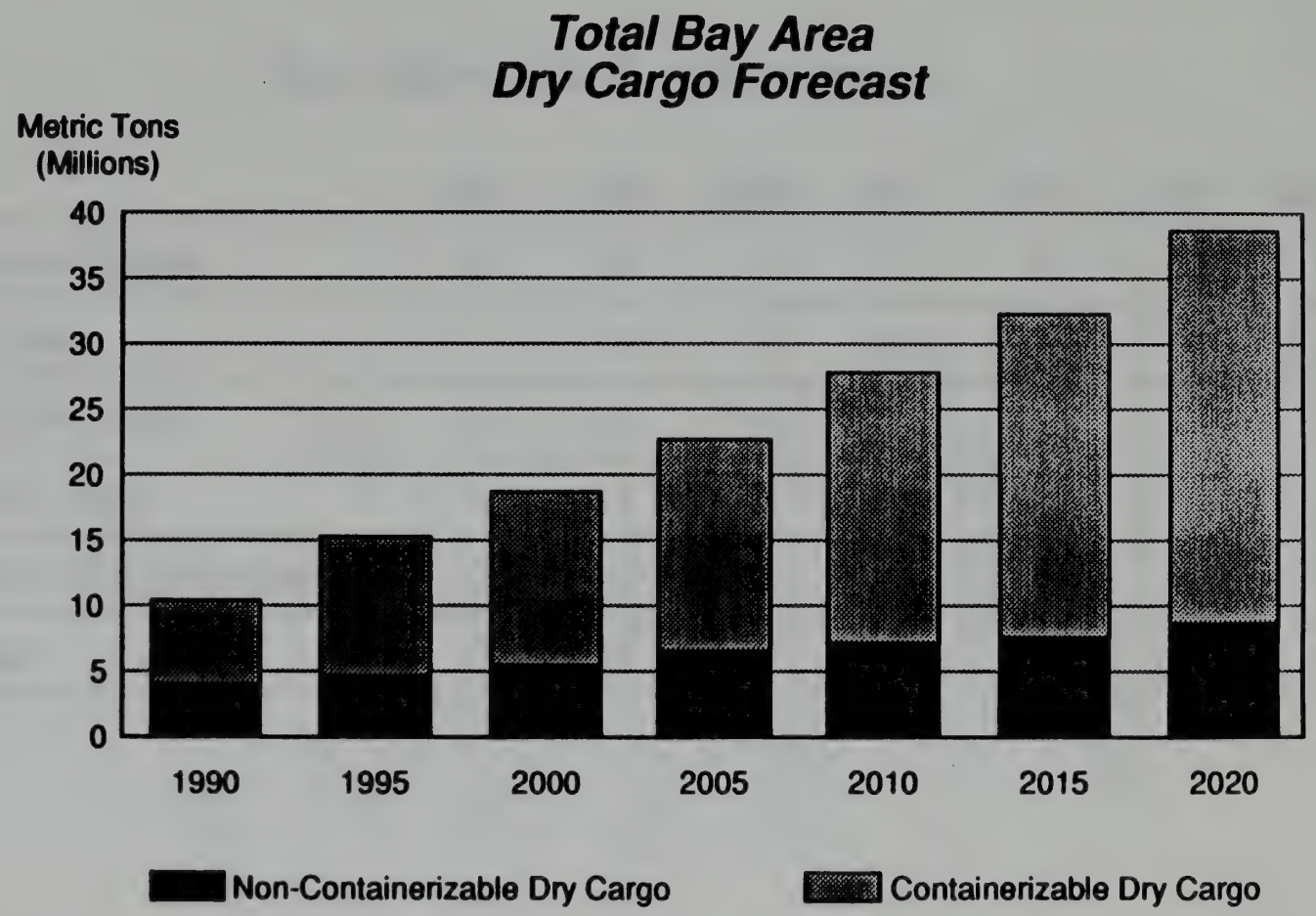
Bay area forecasts also illustrate the diminishing importance of non-containerized cargo over the next 30 years



Source: 1988 Manalytics 2020 Cargo Forecast.

These same forecasts illustrate the region's overcapacity for non-containerized dry cargo

Total Bay Area Surplus Berths

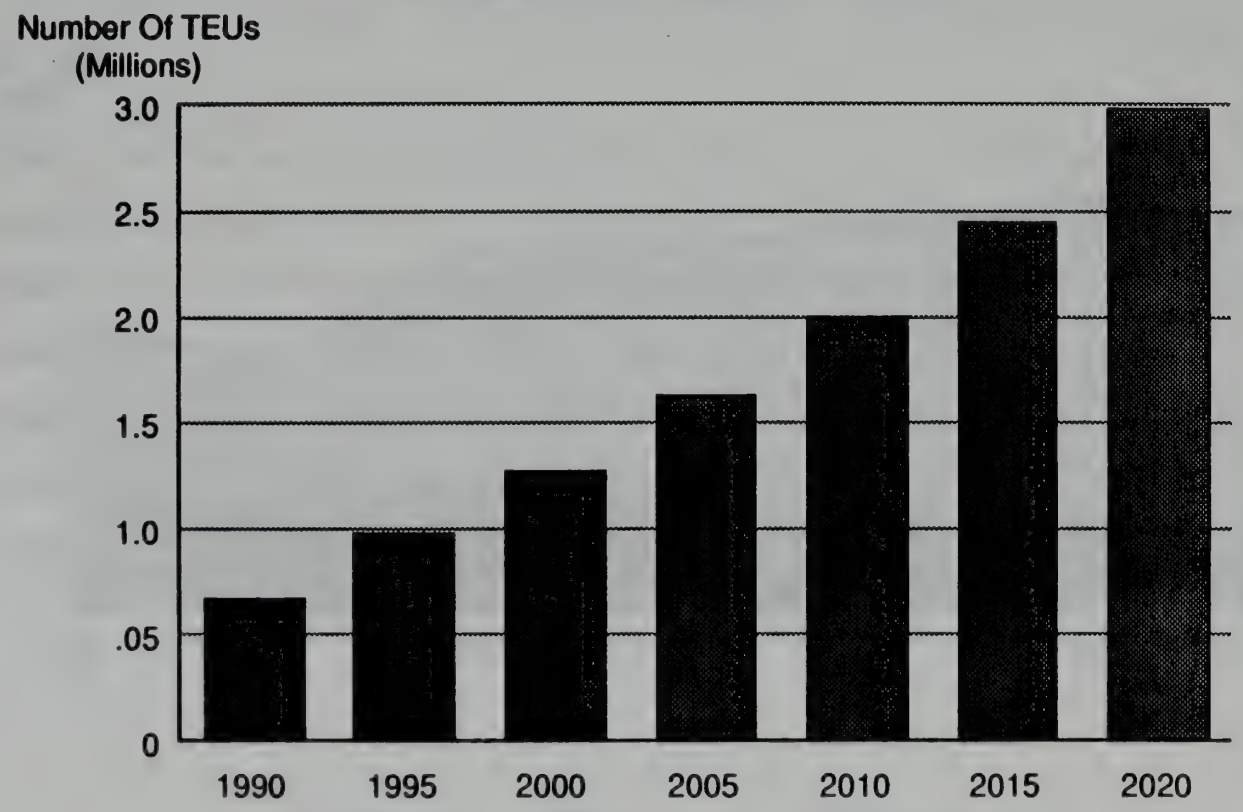
	1990	1995	2000	2005	2010	2015	2020
Combination Break Bulk	10	9	9	7	5	3	0
Pure Break Bulk	4	4	3	3	2	1	0
Combination Neo Bulk	2	2	2	2	1	1	1
Pure Neo Bulk, Auto	4	4	4	4	3	3	2
Pure Neo Bulk, Steel And Newsprint	3	4	3	2	2	1	0
Pure Dry Bulk	2	1	0	(1)	(1)	(2)	(3)

Note: These surpluses are conservative; they were based on the high cargo volume forecast.

Source: 1988 Manalytics 2020 Cargo Forecast.

The majority of the growth will come from the container market

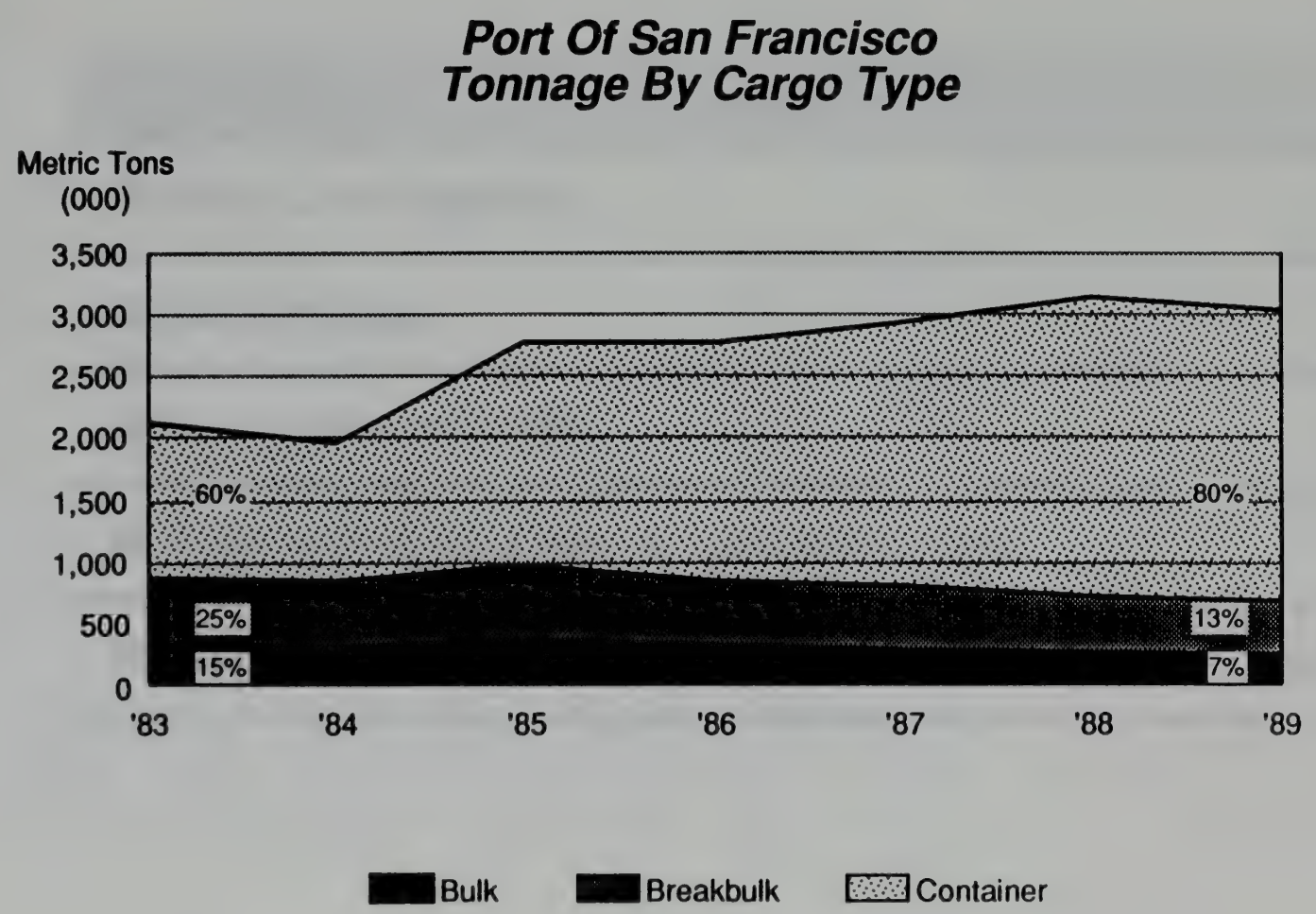
Total Bay Area Containerizable Cargo Forecast



Note: TEUs in this forecast may differ from Port reported data.

Source: 1988 Manalytics 2020 Cargo Forecast.

The Port is moving towards a highly containerized operation



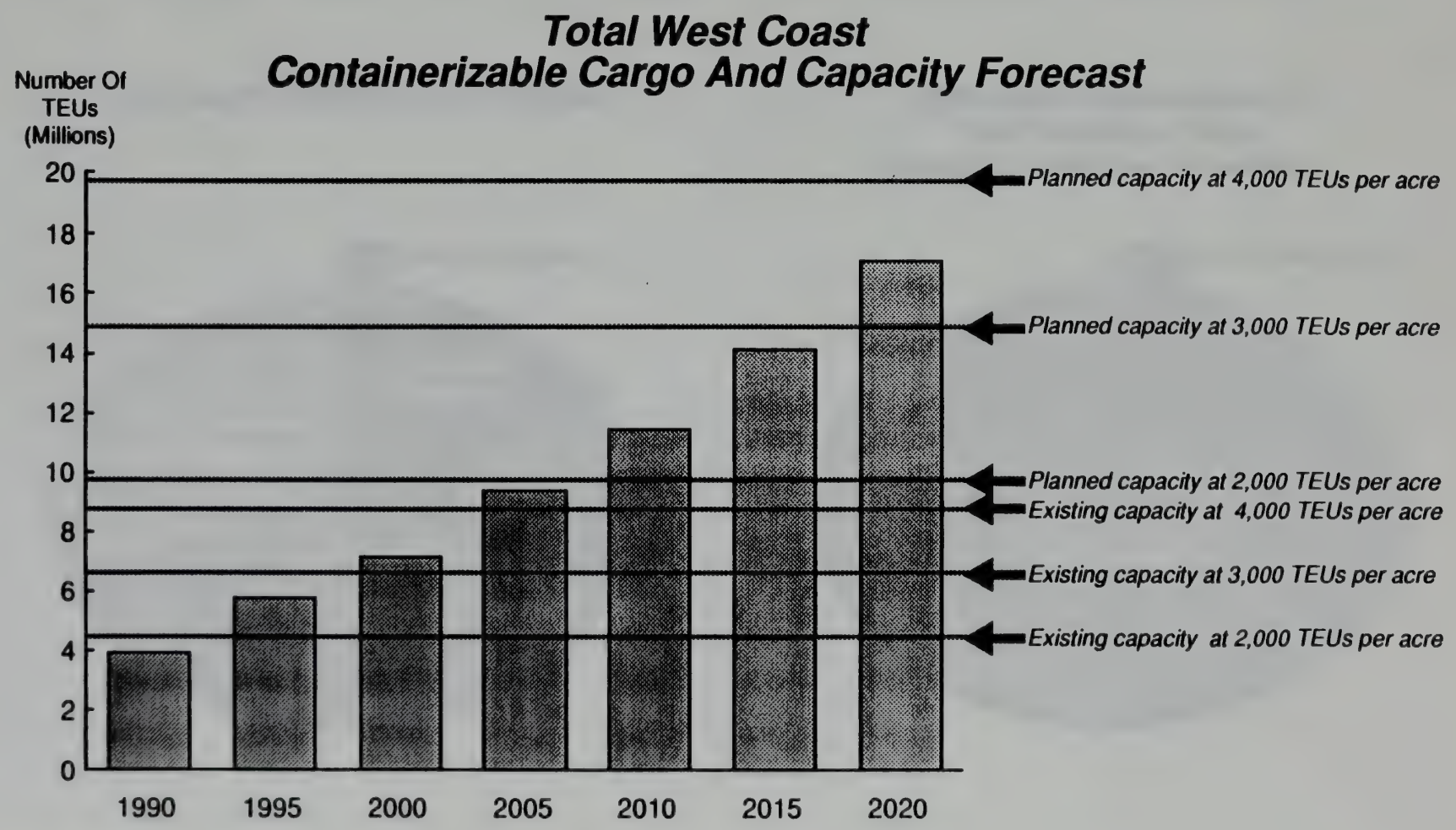
Source: Port Of San Francisco.

San Francisco's participation in this expected container growth is far from guaranteed

Why?

- West Coast capacity
- Relative size
- Competitive strength
- Dependence on a few key steamship lines
- Required investment to keep pace with technological change

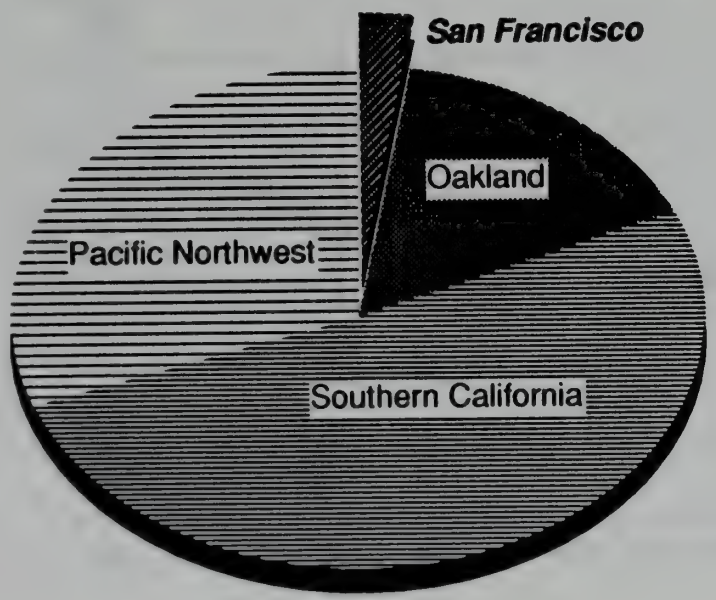
West Coast capacity should keep pace with container growth



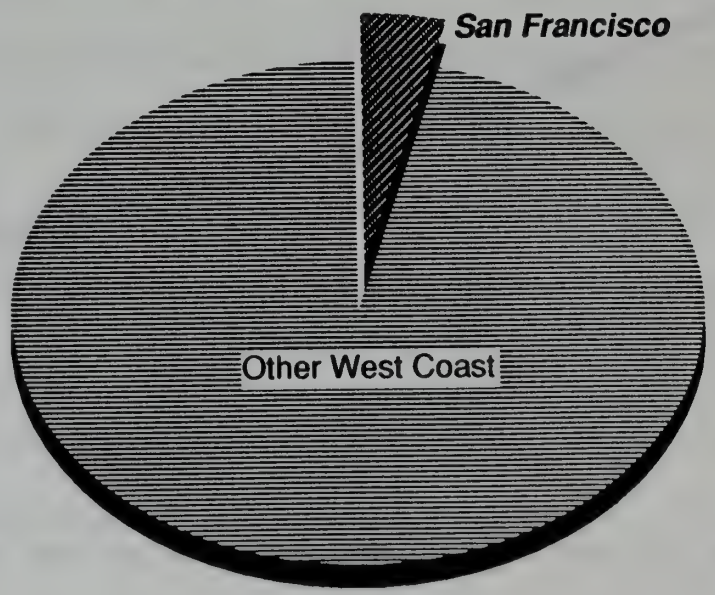
Source: 1988 Manalytics 2020 Cargo Forecast coupled with BST capacity analysis.

San Francisco is unlikely to enjoy the economies of scale and relative power associated with market leadership

1988 West Coast Container Share



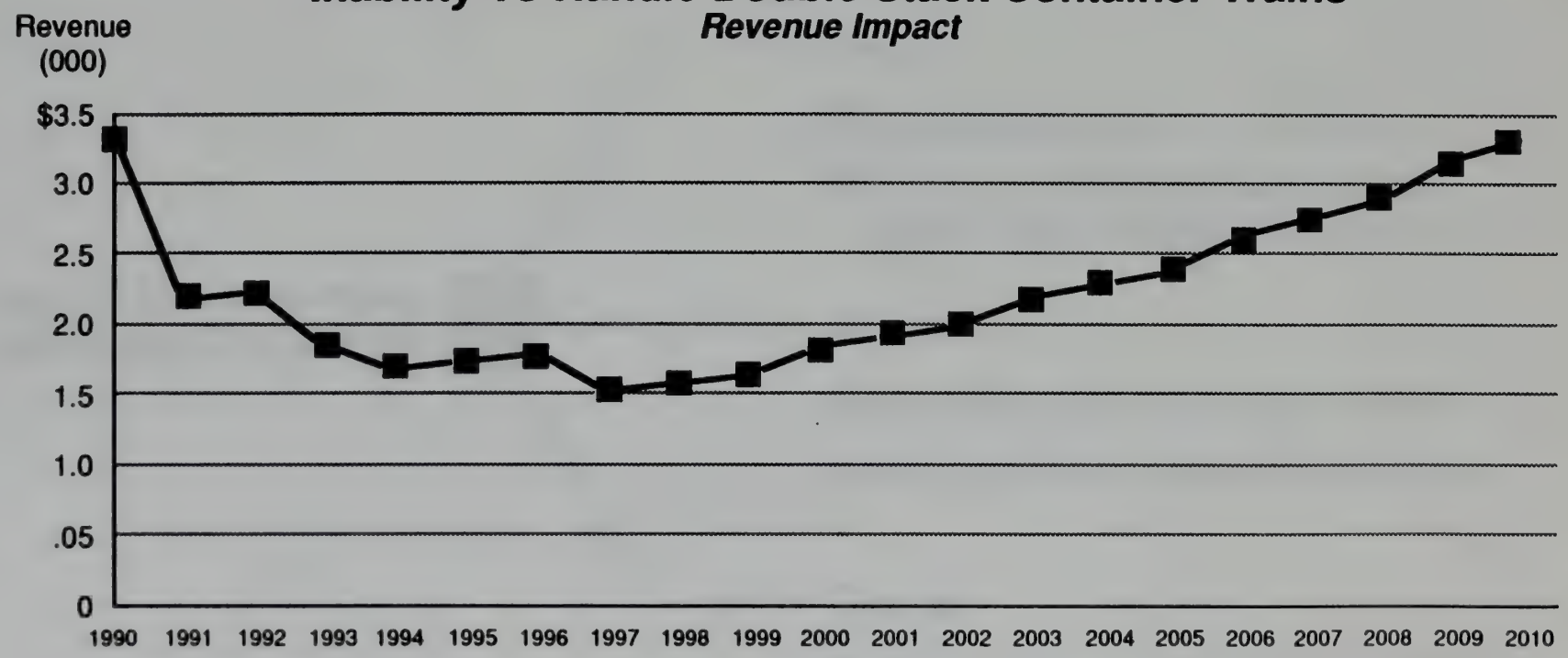
2020 Theoretical Maximum San Francisco Share Based On Planned Expansion



San Francisco could actually lose container traffic and the resultant revenue if it does not keep pace with technological advancement

Inability To Handle Double Stack Container Trains

Revenue Impact



Source: 1989 Manalytics Tunnel Analysis.

To meet the challenges of this competitive environment, The Port Of San Francisco can pursue one of three general directions

Port Of San Francisco Container Operations

Invest

- Add doublestack train access
- Enhance terminal capabilities based on increased business

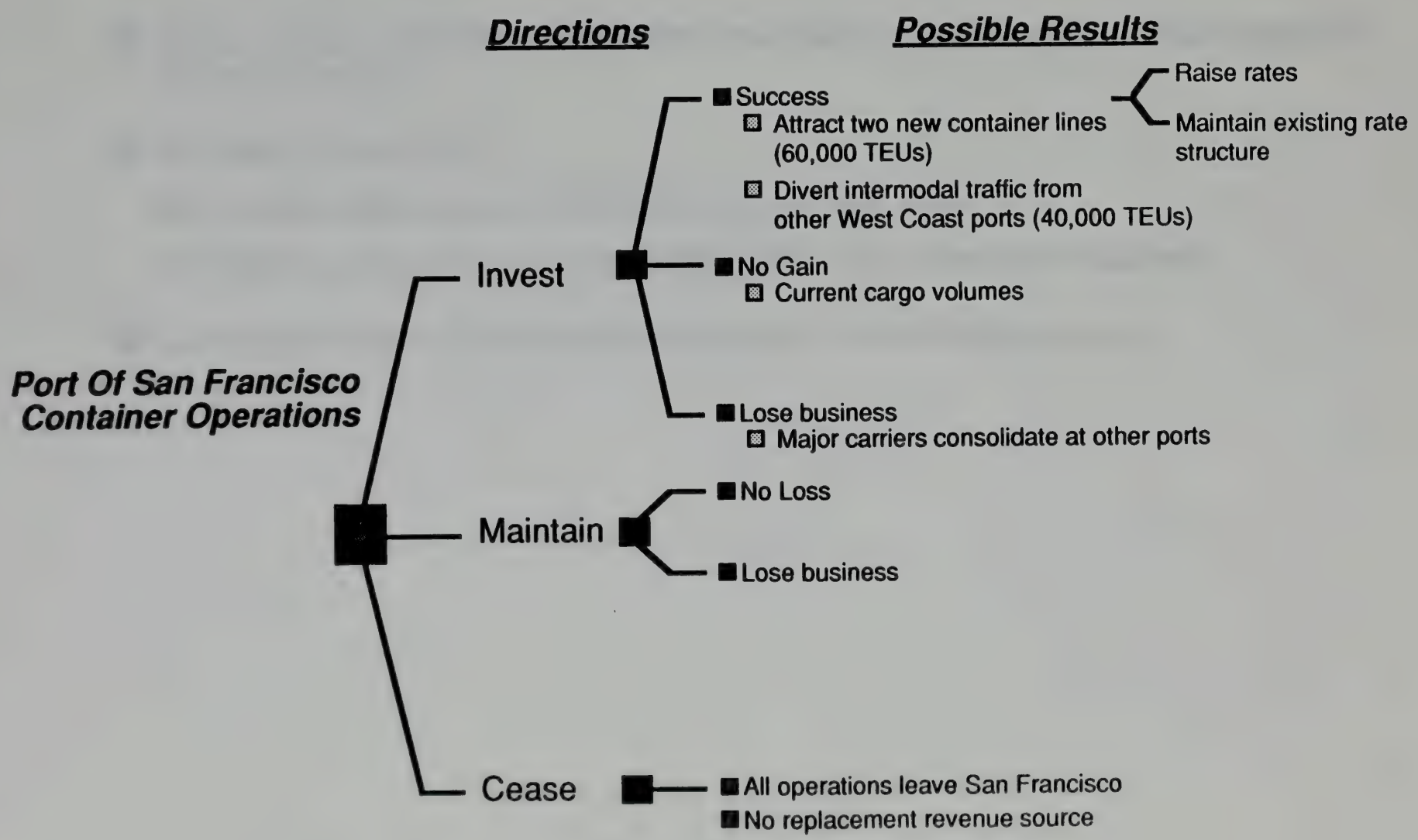
Maintain

- Maintain and manage facilities
- No extensive capital investment

Cease

- Discontinue container operations
- Unable to change land use due to BCDC regulation

The directions can yield varying results, the range of which is illustrated below



The Port should mitigate its risk by pursuing venture partners and a phased investment strategy

- Seek venture partners/alternative operations over time to mitigate negative financial impact
- Phased investment
  - Tunnels plus crane modifications as a first step
  - Withhold other investment until justified by increased business
- Contingent upon final cost estimates for tunnel improvement

PROGRESS TO DATE

KEY ISSUES

ALTERNATIVE DIRECTIONS

APPENDIX

Overview Of Strategic Planning

Set Direction

Mission

A broad description of why the organization exists and its overall purpose

Goals

Broad statements of what the organization hopes to achieve or how the mission will be accomplished

- Goal A
- Goal B
- Goal C
- Goal D
- Goal E

Take Action

Strategic Initiatives

Major actions for attaining goals and resolving key issues

Objectives

Specific, quantifiable targets for what will be accomplished by each strategic initiative

Tactics

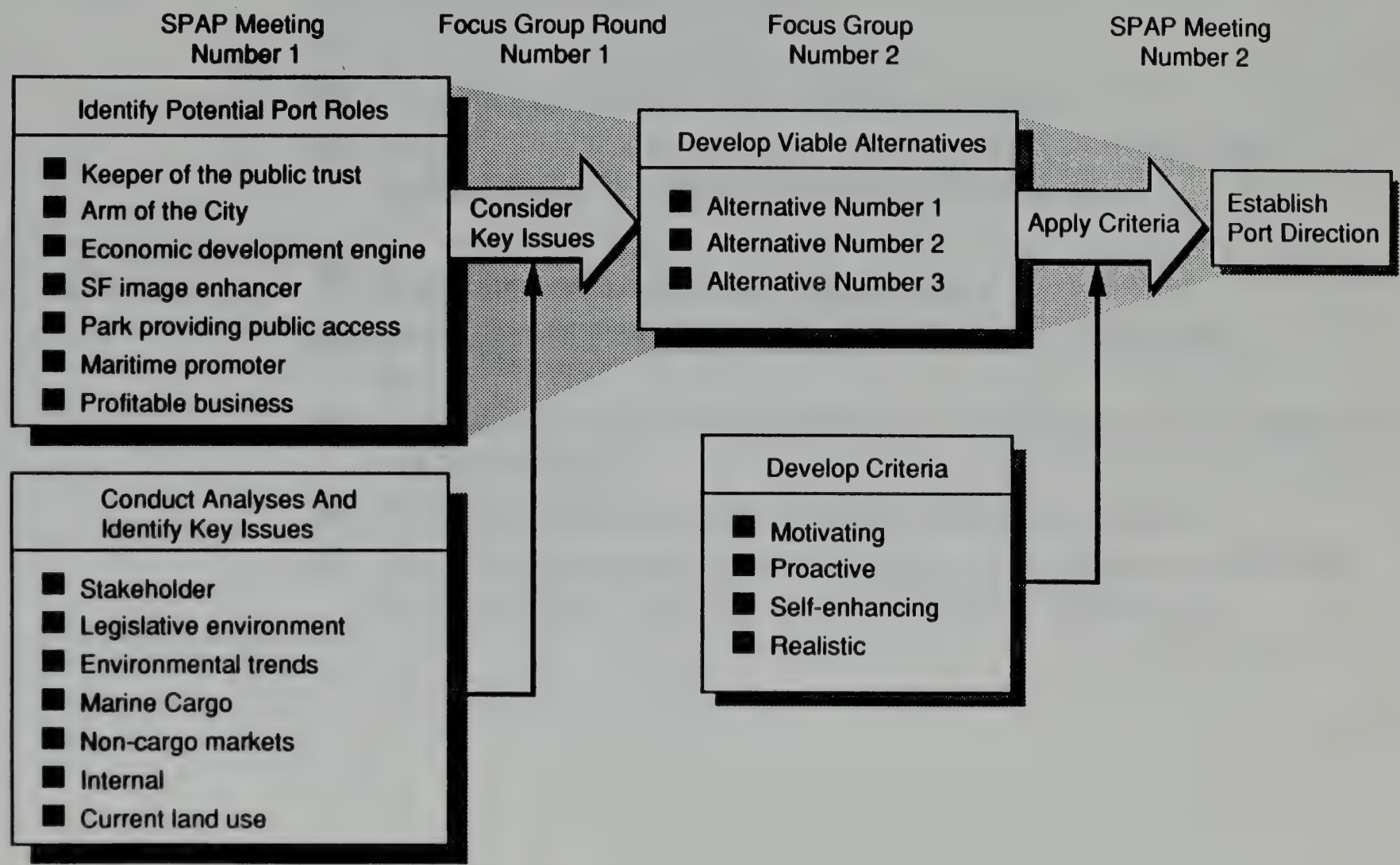
Action steps for how each objective will be achieved

- Strategic Initiative A
- Strategic Initiative B
- Strategic Initiative C
- Strategic Initiative D
- Strategic Initiative E
- Strategic Initiative F
- Strategic Initiative G

Strategic Initiative D → Objective A, Objective B, Objective C

Objective C → Tactic A, Tactic B, Tactic A, Tactic B

In establishing its direction, the Port must consider key issues and the direction criteria



Summary Of Key Issues

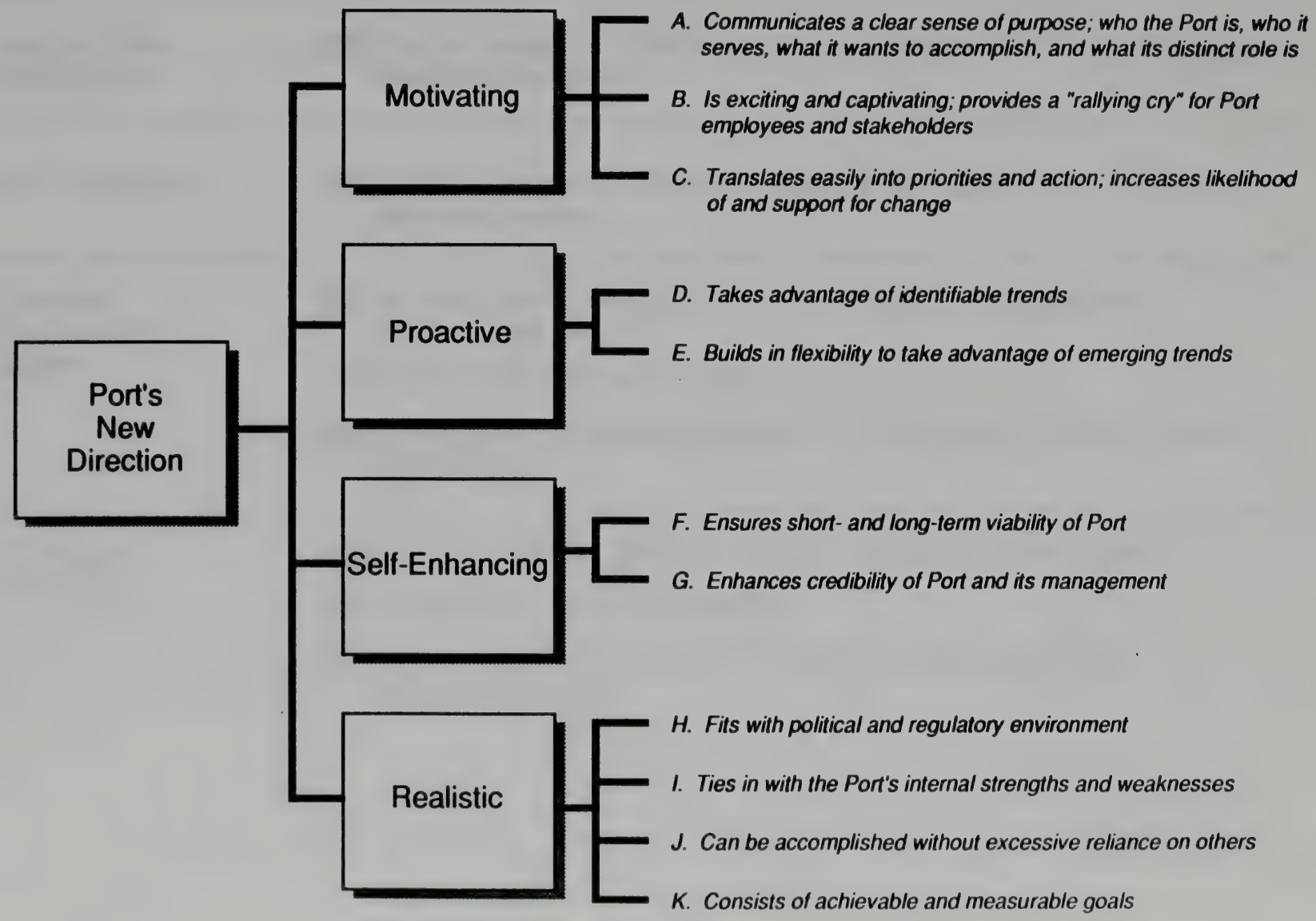
Internal	■ Current direction is unclear ■ Financial health is tenuous ■ Must be financially self-supporting ■ Current substantial non-maritime activities ■ Underutilization of current assets, although short-term opportunities for improvement are available
External	■ Credibility problem with stakeholders ■ Widespread optimism about Port's future, but action needed soon ■ Legislative environment unlikely to change; it is restrictive, but not prohibitive ■ Political environment is complex and often hostile ■ Political imperatives are maritime, public access, economic development, regional cooperation, and balance

Continued...

Summary Of Key Issues

Land Use	■ Maritime and recreational uses have greater political support and regulatory acceptability ■ No single land use options are financial /economic development saviors ■ Total potential financial/economic development impact is small
Marine Cargo	■ A bulk/break bulk niche strategy is not a viable option ■ PSF's participation in expected West Coast container growth is not guaranteed ■ San Francisco is not expected to be a dominant player in the container market ■ From a financial viewpoint, investing is the best option and ceasing operations is the worst ■ Current operations require subsidies and have limited economic impact potential ■ Some risk may be mitigated through joint partnerships and a phased investment approach

The Port's new direction (mission and goals) should be motivating, proactive, self-enhancing, and realistic



Given the key issues, a number of potential roles are not appropriate as the primary Port Mission

Potential Role	Reasons Why Inappropriate As Primary Port Mission
Keeper of the Public Trust	■ This is a reason for Port's existence, but by itself does not establish direction/priorities
Arm of the City	■ This is a reason for Port's existence, but by itself does not establish direction/priorities
Economic Development Engine	■ No single land use option can provide substantial economic development impact ■ Total potential impact is small ■ Given status as political imperative, may be appropriate as secondary Port function
SF Image Enhancer	■ Current credibility problem makes this difficult in near future ■ Clearly not a political imperative ■ Complex political environment means no single definition of "positive image"

Continued. . .

Given the key issues, a number of potential roles are not appropriate as the primary Port Mission

Potential Role	Reasons Why Inappropriate as Primary Port Mission
Park Providing Public Access	■ Port's financial health is tenuous, and public access development alone will exacerbate this problem ■ While public access is a political imperative, it rarely was supported as a primary, standalone mission (balance is also an imperative) ■ Given status as a political imperative, may be appropriate as a co-primary or secondary Port function
Maritime Promoter	■ Port currently has a strong non-maritime orientation; without this the Port's financial position would be significantly worse ■ While maritime is political imperative, the balance imperative precludes a maritime-only Port ■ Marine cargo is anticipated to be a net drain on the Port's financial resources
Profitable Business	■ This role poses potential conflicts with Port's public trustee role ■ No single land use option can provide substantial financial impact ■ Potential conflict with public access and maritime imperatives ■ Legislative environment is too restrictive to operate with profitability as primary mission

The Panel provided some aggregate conclusions

- Satisfied with the key issues as a foundation for developing a direction
- The draft mission and goals must be revised to become more motivating and exciting
- Any drafted mission and goals must reflect the Port's commitment to maintaining a maritime orientation
- The nature of the Port's relationship with the City must be clearly defined for its stakeholders
- The Port's attempt to be financially self-supporting should be considered a goal, not an operating restriction
  - Pursuing the City's financial support for public access related projects
- The initial strategic planning exercise must be followed by detailed land use planning

They also provided us input on their desired mission and goal "format"

Response to "A mission statement should be":	Average
Viewed as a "package" with its supporting goals	1.8
Short and pithy	2.5
Directive, at the risk of being exclusionary	2.5
An outline with a short list of key roles	3.1
All-encompassing, addressing the full spectrum of Port roles	3.2
A paragraph of full sentences	3.3
Able to stand alone without linkage to the supporting goals	3.6

Key:
1 = Strongly Agree
2 = Agree
3 = Neutral
4 = Disagree
5 = Strongly Disagree

Source: Survey of SPAP members

Alternative Direction Number One: A Vibrant Waterfront

Mission				
As a trustee of public land and a financially self-supporting City department, the Port of San Francisco is dedicated to creating a vibrant San Francisco waterfront.				
Goal A	Goal B	Goal C	Goal D	Goal E
Enhance the waterfront's maritime orientation	Provide public access to the waterfront	Generate sufficient income to be self-supporting and maintain a prudent level of reserves for future development	Pursue projects that create jobs and revenue for the City without compromising other goals	Promote diverse uses of Port land consistent with existing regulations

Alternative Direction Number Two: Diverse Land Uses

Mission				
As a trustee of public land and a financially self-supporting City department, the Port of San Francisco is dedicated to the concept of "balance" by promoting diverse uses of its land.				
Goal A	Goal B	Goal C	Goal D	Goal E
Maintain maritime-oriented activities along the waterfront	Provide public access without impairing waterfront diversity	Generate sufficient income to be self-supporting and maintain a prudent level of reserves for future development	Pursue projects that create jobs and revenue for the City without compromising other goals	Encourage and promote new uses of Port land consistent with existing regulations

Alternative Direction Number Three: Subsidized Maritime

Mission				
As a trustee of public land and a financially self-supporting City department, the Port of San Francisco will promote and support the marine cargo industry and other maritime activities to the fullest extent possible, and if necessary, will subsidize these activities through sufficient commercial development				
Goal A	Goal B	Goal C	Goal D	Goal E
Increase marine cargo market share	Provide public access to the waterfront without interfering with maritime activities	Generate sufficient income to be self-supporting and maintain a prudent level of reserves for future development	Pursue projects that create jobs and revenue for the City without compromising other goals	Provide as much maritime activity as possible given financial constraints

The Strategic Planning Advisory Panel gave us comprehensive feedback on the three alternative directions

		Motivating	A	B	C	Proactive	D	E	Self-Enhancing	F	G	Realistic	H	I	J	K	Overall
VIBRANT	Group 1	○	○	○	○	○	○	○	◒	○	●	◒	◒	◒	○	◒	○
	Group 2	○	○	○	○	◒	◒	◒	◒	◒	○	◒	●	◒	○	○	○
	Group 3	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○
	Total	○	○	○	○	○	○	○	◒	○	◒	◒	◒	◒	○	○	○
DIVERSITY	Group 1	◒	●	○	◒	◒	◒	◒	◒	○	●	◒	◒	◒	○	●	◒
	Group 2	◒	◒	◒	◒	●	●	●	◒	◒	◒	◒	◒	○	◒	○	◒
	Group 3	○	○	○	○	◒	●	●	◒	●	◒	●	●	●	●	●	◒
	Total	◒	◒	○	◒	◒	●	●	◒	◒	◒	◒	◒	◒	◒	◒	◒
MARITIME	Group 1	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○
	Group 2	◒	●	◒	○	◒	◒	○	◒	◒	○	◒	○	◒	○	◒	◒
	Group 3	◒	●	○	◒	○	◒	◒	◒	○	●	○	○	◒	○	○	◒
	Total	◒	◒	○	○	○	◒	○	◒	○	◒	○	○	◒	○	○	◒

Note: Letters correspond to the evaluation criteria presented earlier in this section

Key
- ● Fully meets criteria
- ◒ Partially meets criteria
- ○ Does not meet criteria

Port of San Francisco

LIST OF INTERVIEWEES

Name	Organization
BCDC	
Allan Pendelton	BCDC
Nancy Wakeman	BCDC
Steven McAdam	BCDC
William Travis	BCDC
Other Staff (3)	BCDC
State Lands Commission	
Claire Deitrich	State Lands Commission
Jane Sekelsky	State Lands Commission
Dennis Eagan	State Lands Commission
Dianne Jones	State Lands Commission
City Government	
Art Agnos	Mayor of San Francisco
James Ho	Deputy Mayor - Business And Economic Development
Claire Denning	Metropolitan Transportation Committee
Jim Gonzalez	San Francisco Board of Supervisors
Peter Miller	San Francisco CAO's Office
Dean Macris	San Francisco City Planning
George Williams	San Francisco City Planning
Jim Jefferson	San Francisco Fire Commission

Name	Organization
Louis Turpen	San Francisco International Airport
Bob Gamble	San Francisco Redevelopment Agency
Ed Helfeld*	San Francisco Redevelopment Agency
Maritime Interests	
Walter Schrieber	COSCO Representative
Ken Sanford	Denver/Rio Grande Railroad
Robert Kleist*	Evergreen
Al Bacarri	Fisherman's Wharf Merchant Association
C. Huh	Hanjin Shipping
Eugene Swanson	Matson Freight Agencies
Hank Pouderoin	Nedlloyd
Nenon Price	NP Communications
Shigejiro Isogai	NYK Line
Louise Ingle	Port of Oakland
Warren Titus*	Seaborne Cruise Lines
Ray Holbrook	Stevedoring Services of America
Woody Williams	Southern Pacific Transportation Company
George Farosich	Southern Pacific Transportation Company
Carl Hanson*	Southwest Marine
Alejandro Stenger	Trans Maritima Mexicana
Joe Todisco	Western Rim Company, LTD.
Capt. A. Zolberg	ZIM Container Line
Barry Horowitz	ZIM Container Line

Name	Organization
Port Staff	
Michael Huerta	Executive Director
Jack Pizza	Assistant City Attorney
Jack Conrad	Commercial
Barbara Cooper	Employee Safety
Cliff Jarrard	Engineering
Walter Sequeira	Engineering
James MacFarlan	Engineering
Art Osborne	Engineering & Maintenance
Michael Janis	Executive Assistant
Rich Ayers	Finance
Ben Kutnick	Finance
Veronica Sanchez	Government/Public Affairs
Tom Gross	Government/Public Affairs
Bayerd Fong	Human Rights Commission
Maurice Edwards	Maintenance
Roger Peters	Maritime
Charlie Mitchell	Maritime
John Neudecker	Maritime
Peter Dailey	Maritime
Louise Anderson	Maritime
Ron Stone	Maritime
Denise Martinez	Maritime
Steve Amano	Personnel

Name	Organization
Paul Osmundson	Planning
Rick Wiederhorn	Planning
Dianne Artz	Property
Mike Winpress	Property
Dorothy Schimke	Property
Pat Wilson	Property
Henry Williams	Property
Kerri Lung	Property Development
Carol Brown	Seafood Center Consultant
Port Commissioners	
Doug Wong	Port Commission
James Bouskos	Port Commission
James Herman	Port Commission
Arthur Coleman	Port Commission
Anne Halstead	Port Commission
Other Experts/ Interested Parties	
Sally Germane	Association of Bay Area Governments
Michael Wilmar	Nossaman, Guthner, Knox & Elliott
Mike McGill*	Bay Area Council
Seth Bayman	Bayside Village
Luis Valencia*	Citicorp Savings
Randi Rossi	City of San Luis Obispo

Name	Organization
Steve O'Connor	Cruise Line International Association
John Lemon	Government Finance Associates
Dwight Steeves	Harvey Rose Accountancy
Tom Dorn	Harvey Rose Accountancy
Tim Reynolds	Hornblower Yachts
Martha Casey	International Council of Shopping Centers
Jay Scott	Laventhol & Horwath
Leo Fermin	Martin O'Connell Associates
Lee Eisner	Oakland Developer
Art Latno*	Pacific Telesis
Dan Flanagan	PSF Washington Lobbyist
John Miller	Public Financial Management
Dan Wallick	Public Financial Management
Shirley Kohlwes*	Red & White Fleet
Karen Alaria	San Francisco Chamber of Commerce
John Marks	San Francisco Convention & Visitors Bureau
Kent Sims	San Francisco Economic Development Corporation
Michael Nolan	The Koll Company
Redmund Kunanan	The Koll Company
Kathy Beemer	United Way of the Bay Area
Carla Anneton	Urban Land Institute
William Chang*	Westlake Care Corporation

*Strategic Planning Advisory Panel Member

Port of San Francisco

FOCUS GROUP MEMBERS

Name	Organization	Focus Group
Ruth Gravanis	Mission Creek Conservancy	Environment
Marc Holmes	Save San Francisco Bay Association	Environment
E. Clement Shute*	Shute, Mihaly, & Weinberger	Environment
Zach Cowan	Sierra Club	Environment
Pat Flanagan	Standard Fisheries	Environment
Jack Morrison*	San Francisco Tomorrow	Environment
Ted Bratz	Golden Gate Bridge Highway and Transportation District	Ferry
Terry MacRae	Hornblower Yachts	Ferry
Mark Roddin	Metropolitan Transportation Committee	Ferry
Fritz Arko	Blue and Gold Fleet	Ferry
Shirley Kohlwes*	Red & White Fleet	Ferry
Stephanie Thornton	Coastal Resource Center	Fishing
Ray Nicolai	Fisherman	Fishing
Sal Balestrieri	Fisherman's Wharf Seafoods, Inc.	Fishing
Tom Molton	Long's Fish Company	Fishing
Brian Lewis	Long's Fish Company	Fishing
Kevin McCurdy	Meatball Bait California Crayfish	Fishing
Zeke Grader*	PCFFA	Fishing
Tom Creedon	Scoma's	Fishing

Name	Organization	Focus Group
Pat Flanagan	Standard Fisheries	Fishing
Richard Lackey	Fishfinder	Fishing
Marina Secchitano	IBU	Organized Labor
Herbert Shelmandine	IBU	Organized Labor
Brian McWilliams*	ILWU	Organized Labor
Ted Wright	Local 3 - Operating Engineers	Organized Labor
Bob Clark	Local 3 - Operating Engineers	Organized Labor
Tony Sasso	Marine Engineers Benevolent Association/NWU	Organized Labor
Whitey Disley	MFOW	Organized Labor
Paul Dempster	Sailor Union of the Pacific	Organized Labor
Walt Johnson	San Francisco Labor Council	Organized Labor
Jim Eschen	California Stevedore & Ballast Co.	Marine Cargo
Robert Kleist*	Evergreen	Marine Cargo
J.R. Popham	Matson Freight Agencies	Marine Cargo
Eugene Swanson	Matson Freight Agencies	Marine Cargo
George Farosich	Southern Pacific Railroad	Marine Cargo
Sandi Lira	Stevedoring Services of America	Marine Cargo
Rai Okamoto	Arts Commissioner	Northern Waterfront
Toby Rosenblatt	Planning Commissioner (former)	Northern Waterfront
Gerald Adams	San Francisco Examiner	Northern Waterfront
Nan Roth	Telegraph Hill Dwellers	Northern Waterfront

Name	Organization	Focus Group
Rod Frebairn-Smith*	Telegraph Hill Dwellers	Northern Waterfront
Woody Stockwell	Telegraph Hill Dwellers	Northern Waterfront
Denise H. McCarthy	Telegraph Hill Neighborhood Center	Northern Waterfront
Mary Helene Lolli*	Castignola's	Retail
M.K. Veloz	Port Tenants Association	Retail
Tom Creedon	Scoma's	Retail
Peter Brown	The Anchorage	Retail
Chris Martin	The Cannery	Retail
Gary Burns	Torentino's	Retail
John Gardner	Continental Maritime	Ship Repair
Peter Blake	General Engineering and Machine Works	Ship Repair
Carl Hanson*	South West Marine	Ship Repair
David Curto	Steam Valve Machine Co., Inc.	Ship Repair
Joseph Scott	Tork Systems	Ship Repair
Bob Isaacson	Mission Creek Harbor Association	Southern Waterfront
Richard Moss	Potrero Boosters	Southern Waterfront
John DeCastro*	Potrero Boosters	Southern Waterfront

*Strategic Planning Advisory Panel Member

Port of San Francisco

Key Documents And Studies

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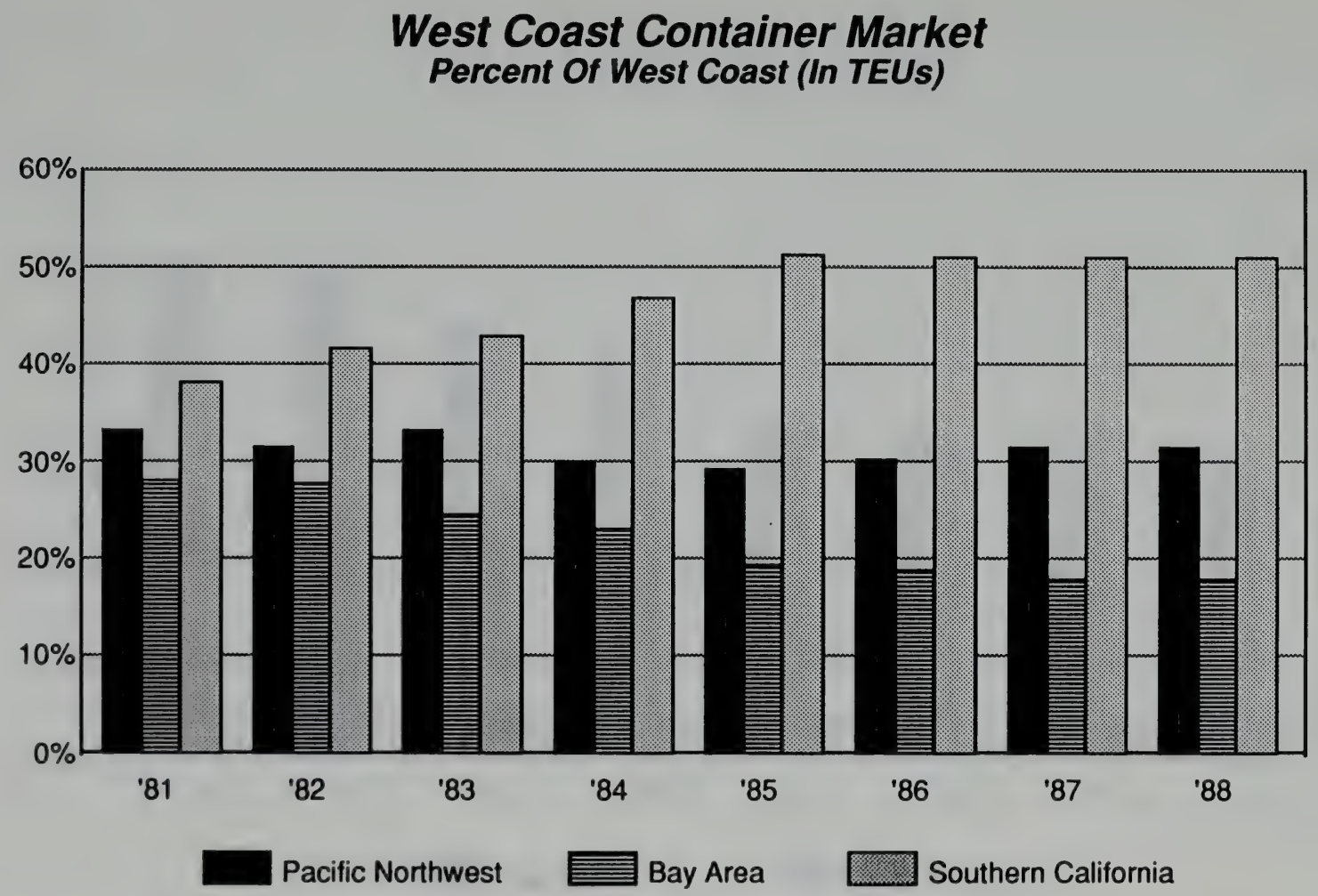
MARINE CARGO

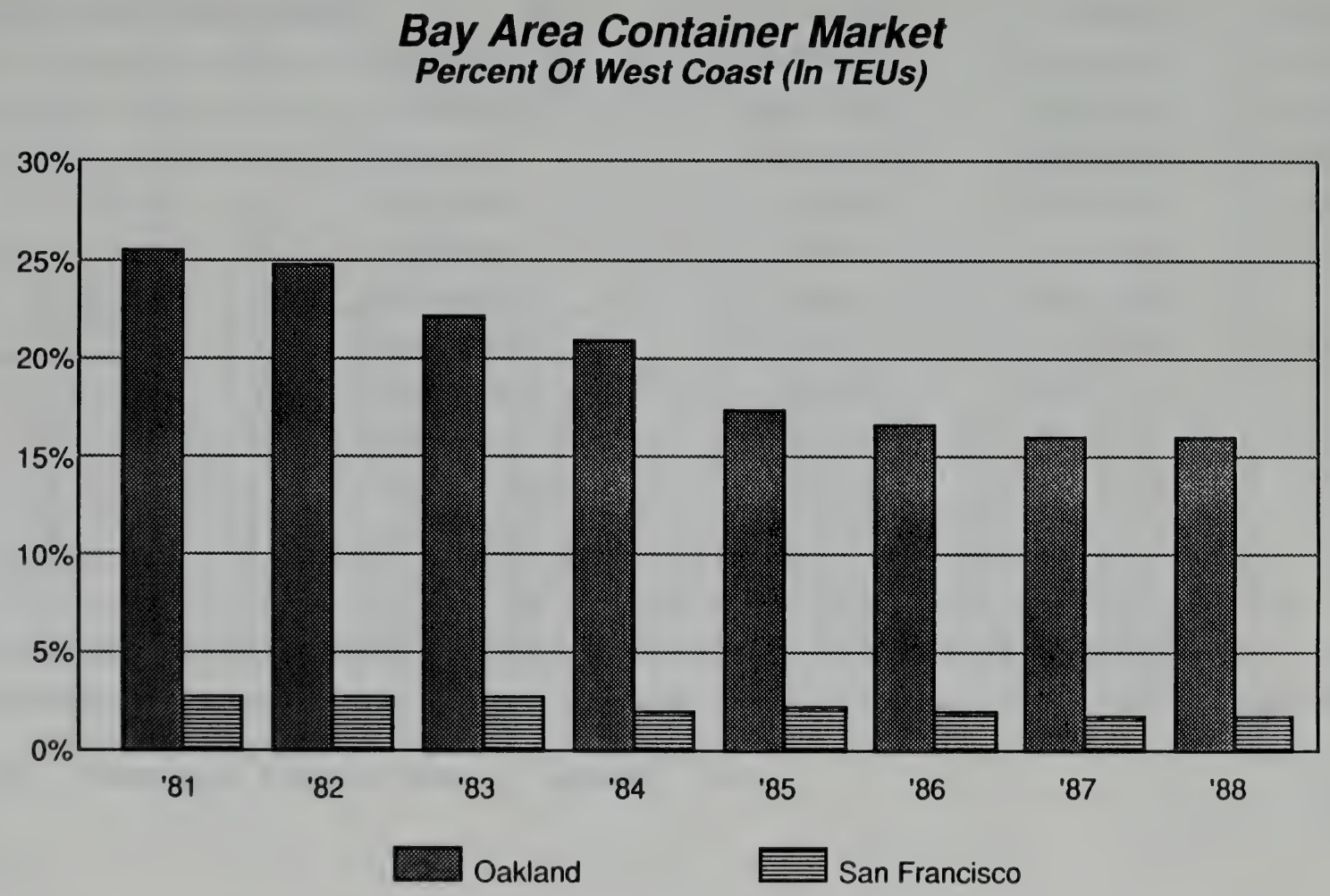
PAST AND CURRENT SITUATION

The Bay Area's market share of West Coast container movements has fallen from 28.3% to 18.1% in just seven years



Source: Containerization International

However, the Port Of San Francisco has maintained a relatively stable market share, holding at approximately 2.5%



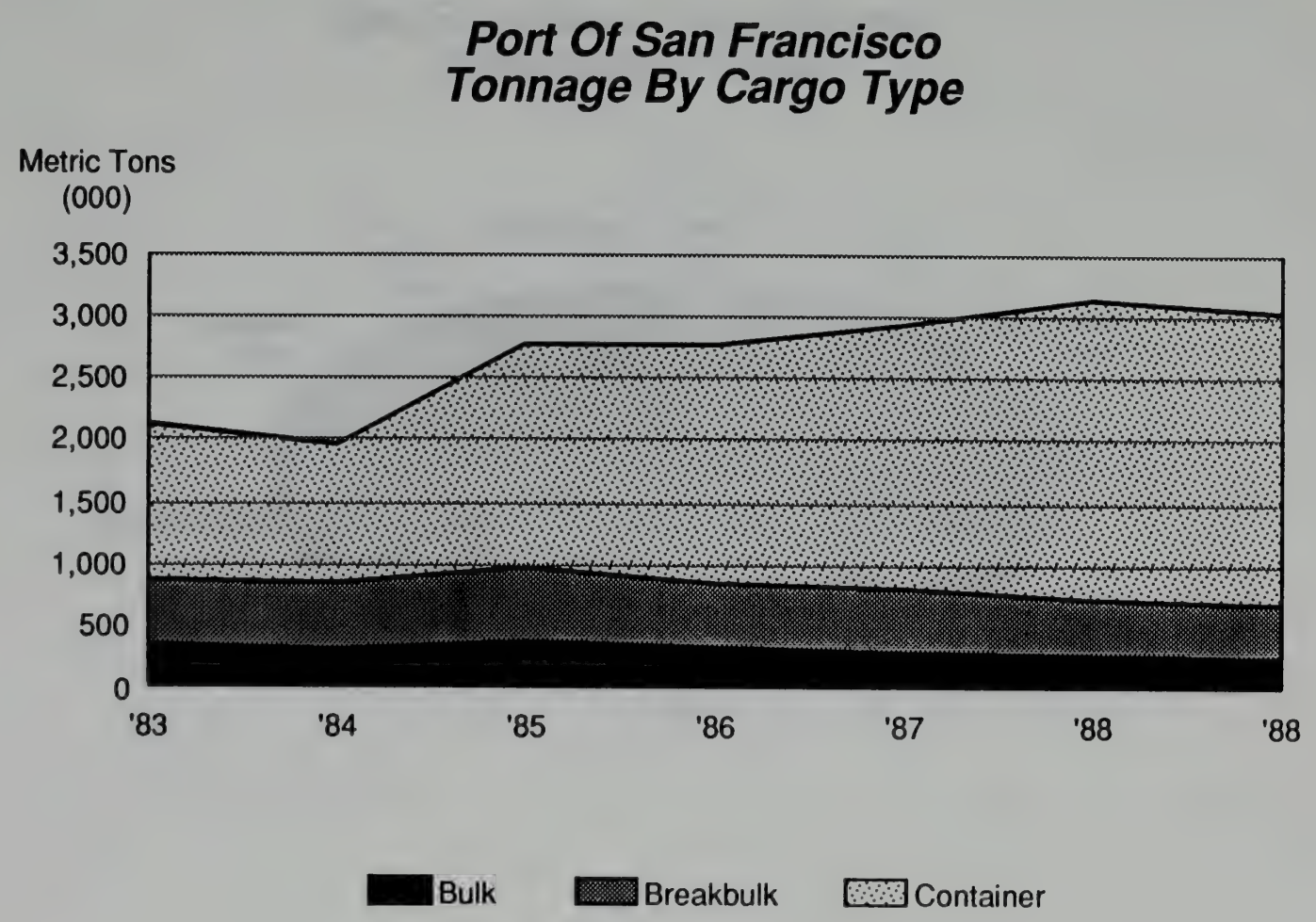
Source: Containerization International

West Coast Container Traffic
(TEU)

Rank 1987	Rank 1988	Port	1987	1988	1989 (Projected)
1	1	Los Angeles	1,579,629	1,652,070	1,735,000
2	2	Long Beach	1,460,287	1,539,803	1,600,000
3	3	Seattle	1,026,398	1,024,035	1,010,000
4	4	Oakland	953,861	1,020,600	1,098,000
5	5	Tacoma	696,800	781,816	875,000
6	6	Vancouver	280,777	305,738	-
7	7	Anchorage	205,902	200,886	211,989
8	8	Portland	139,575	164,596	169,200
9	9	San Francisco	115,970	122,285	131,200
10	10	Fraser Port	12,700	24,719	37,450
12	11	San Diego	6,952	7,363	8,800
13	12	Longview	3,973	3,787	3,168
11	13	Stockton	8,500	2,500	3,000
		Total	6,491,324	6,850,198	6,882,807

Source: Cargoware International - October, 1989

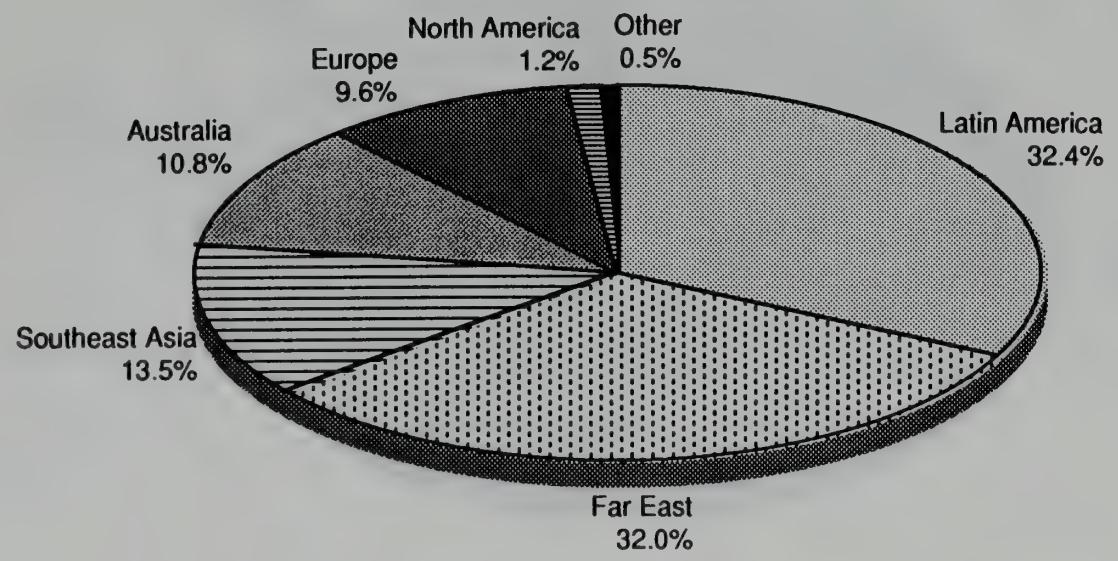
The Port has realized a substantial shift in its mix of business



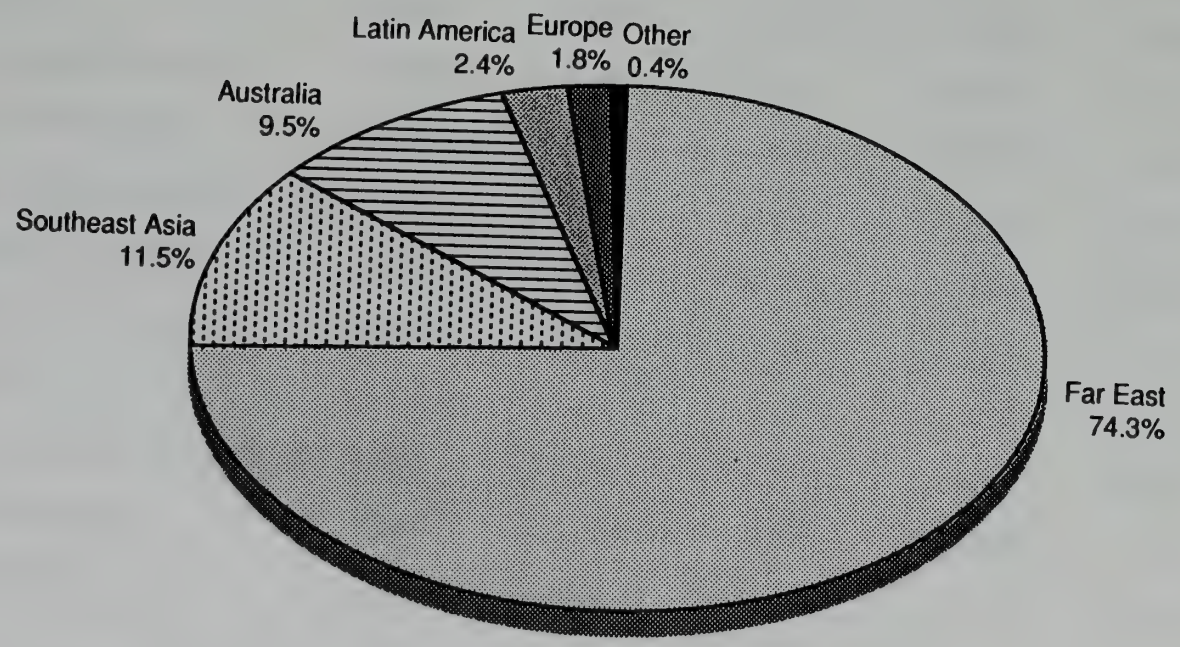
Source: Port Of San Francisco.

San Francisco has developed a balanced mix of import trade routes

San Francisco Trade Routes
1988 Market Share



Port Of San Francisco's exports are highly focused on Far East trade



Port of San Francisco

Top 10 Breakbulk Imports

		1987			1988		
Rank	Commodity	Metric Tons	Percent Share of Bay Area	Percent Share of W. Coast	Metric Tons	Percent Share of Bay Area	Percent Share of W. Coast
1	Animal Feed	8,057	8.2%	18.0%	12,910	52.5%	32.1%
2	Motor Vehicle Parts	518	1.2	0.4	8,909	21.3	5.5
3	Organic Chemicals	2,233	4.9	0.8	8,237	14.7	3.5
4	Alcoholic Beverages	181	6.3	1.1	2,852	36.3	13.1
5	Crude Fertilizers	1,750	100.0	62.7	2,736	34.6	29.0
6	Veneers and Plywood	1,034	7.3	0.8	1,715	20.3	0.9
7	Tractors	1,229	47.7	18.1	1,172	35.3	11.4
8	Civil Engineer Equipment	899	11.7	3.5	801	15.1	3.5
9	Cement Products	240	0.1	0.0	787	0.3	0.0
10	Wood Products	349	10.2	0.2	607	19.8	0.2

Note: Data are subject to reporting errors.

Source: BST Associates, Port of San Francisco using U.S. Department of Commerce international trade data.

Port of San Francisco

Top 10 Breakbulk Exports

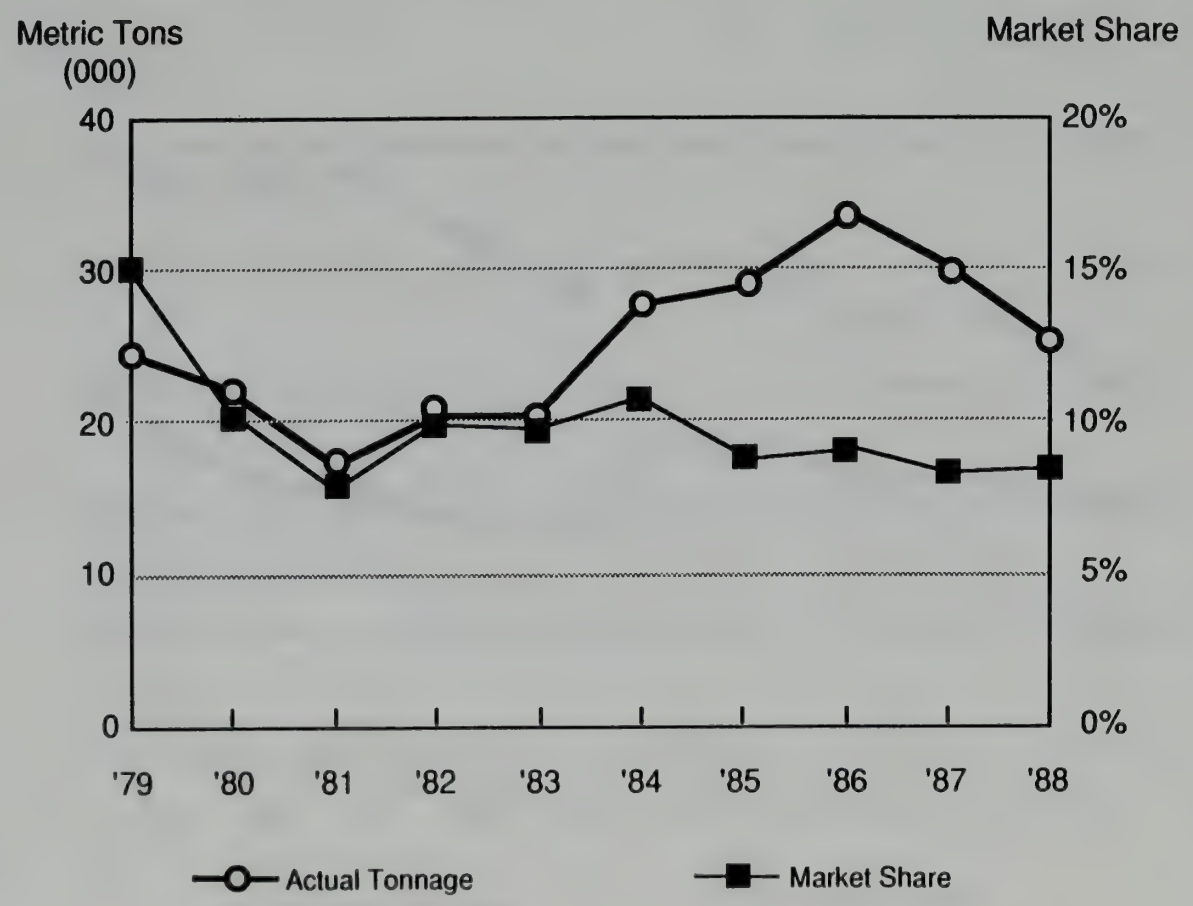
		1987			1988		
Rank	Commodity	Metric Tons	Percent Share of Bay Area	Percent Share of W. Coast	Metric Tons	Percent Share of Bay Area	Percent Share of W. Coast
1	Waste Paper	9,923	3.0%	0.9%	37,856	11.1%	2.9%
2	Chemical Products	155	0.3	0.2	15,317	26.8	21.6
3	Wood Products	424	2.6	0.0	5,095	18.0	0.4
4	Specified Hydrocarbons	0	0.0	0.0	4,052	26.3	7.8
5	Fruits and Nuts	910	5.3	0.4	3,063	10.5	1.1
6	Vegetables	1,291	17.3	2.4	2,843	25.2	3.3
7	Cotton	1,184	13.2	3.2	2,772	29.8	4.2
8	Fresh Meat	1,462	6.0	2.6	1,880	6.4	2.8
9	Animal Feed	1,186	3.1	0.4	1,627	3.1	0.5
10	Milk and Cream	1,693	83.2	26.0	1,438	10.5	5.6

Note: Data are subject to reporting errors.

Source: BST Associates, Port of San Francisco using U.S. Department of Commerce international trade data.

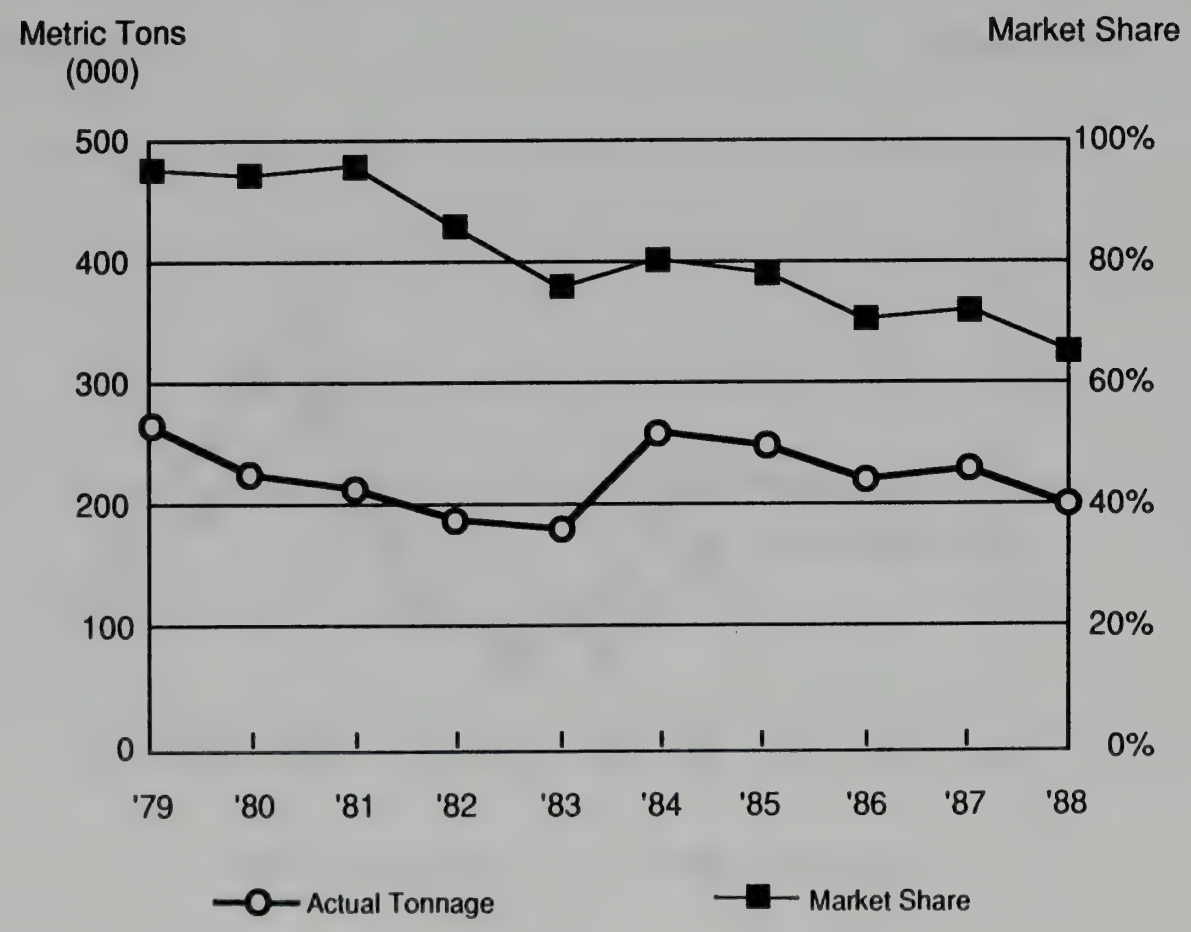
The Port has played a relatively small role in Northern California auto imports

San Francisco Auto Imports Actual Tonnage And Share Of Northern California Market



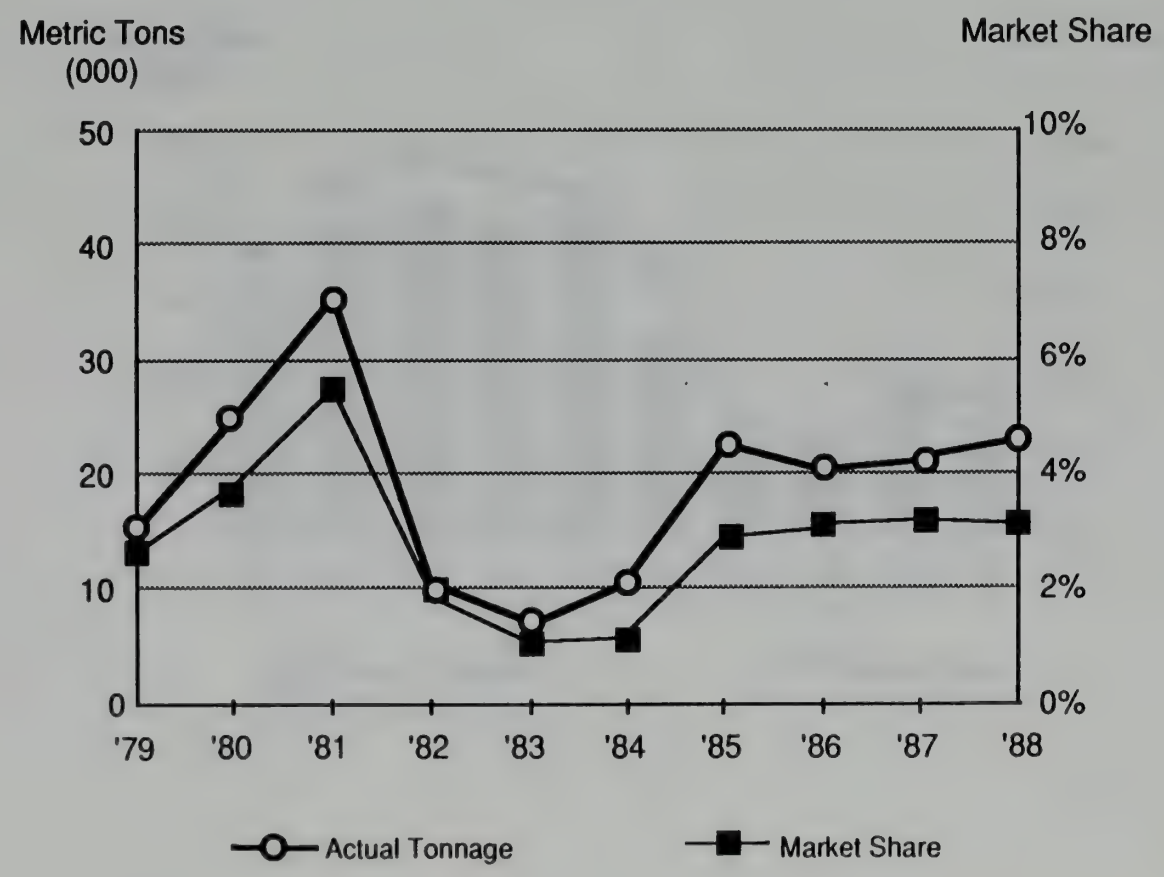
San Francisco paper imports have declined in both tonnage and market share

San Francisco Paper Imports
Actual Tonnage And Share Of Northern California Market



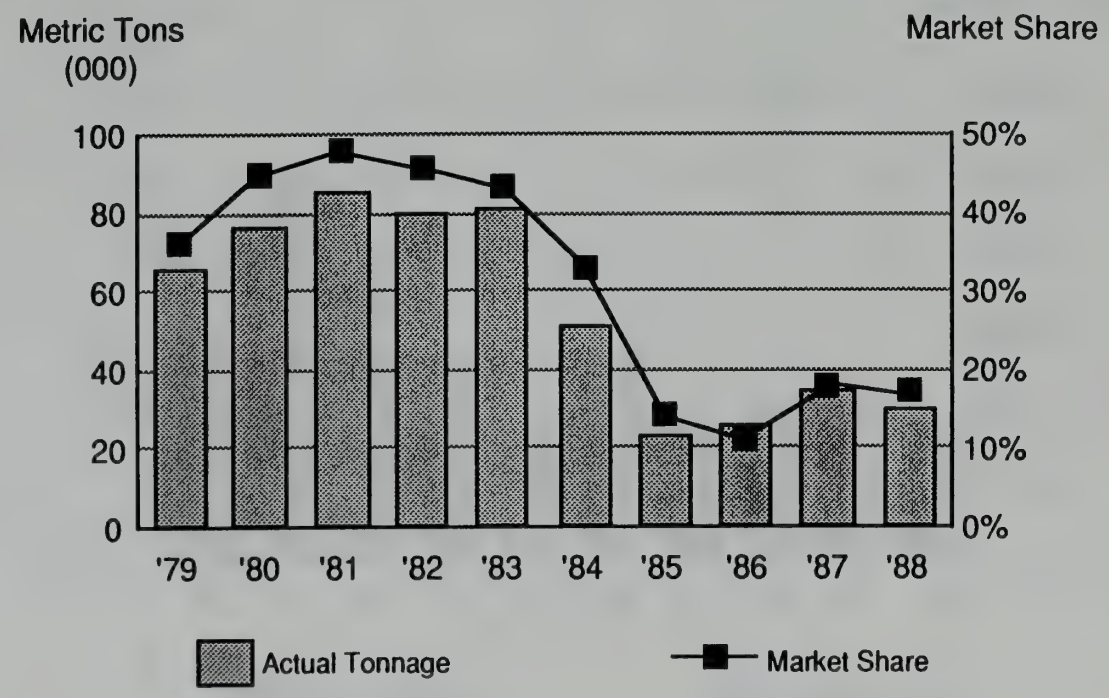
San Francisco plays a small role in steel imports

San Francisco Steel Imports
Actual Tonnage And Share Of Northern California Market



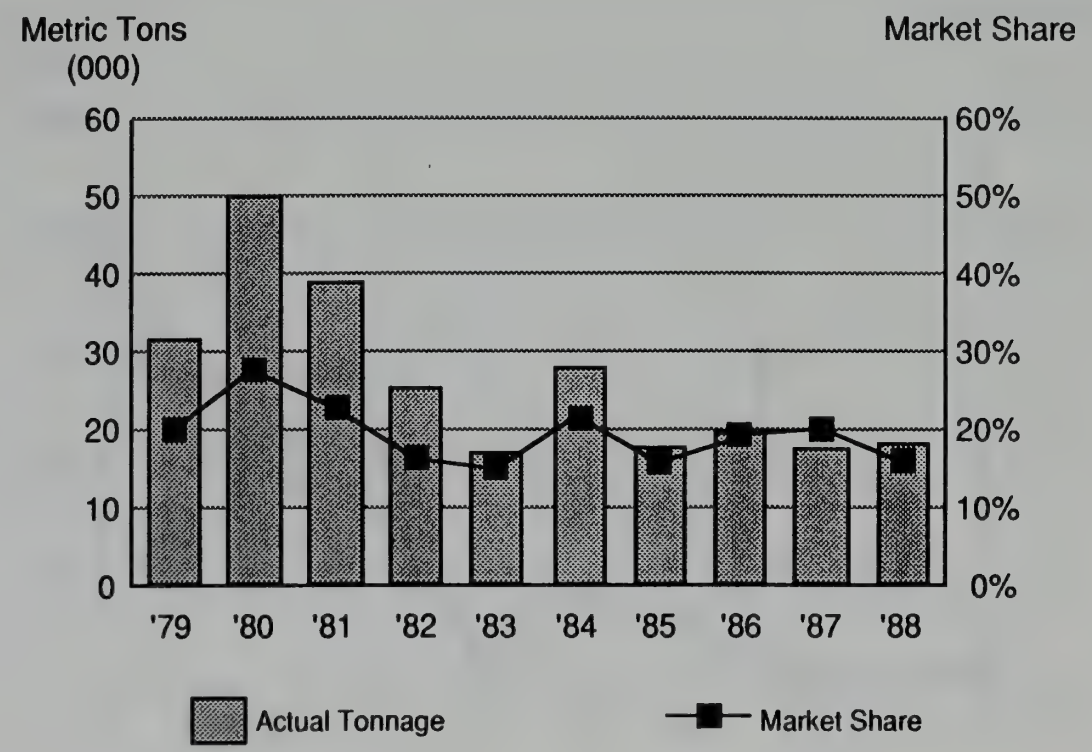
Vegetable and animal oil imports have significantly declined since the early 1980s

San Francisco Vegetable And Animal Oil Imports Actual Tonnage And Share Of Northern California Market



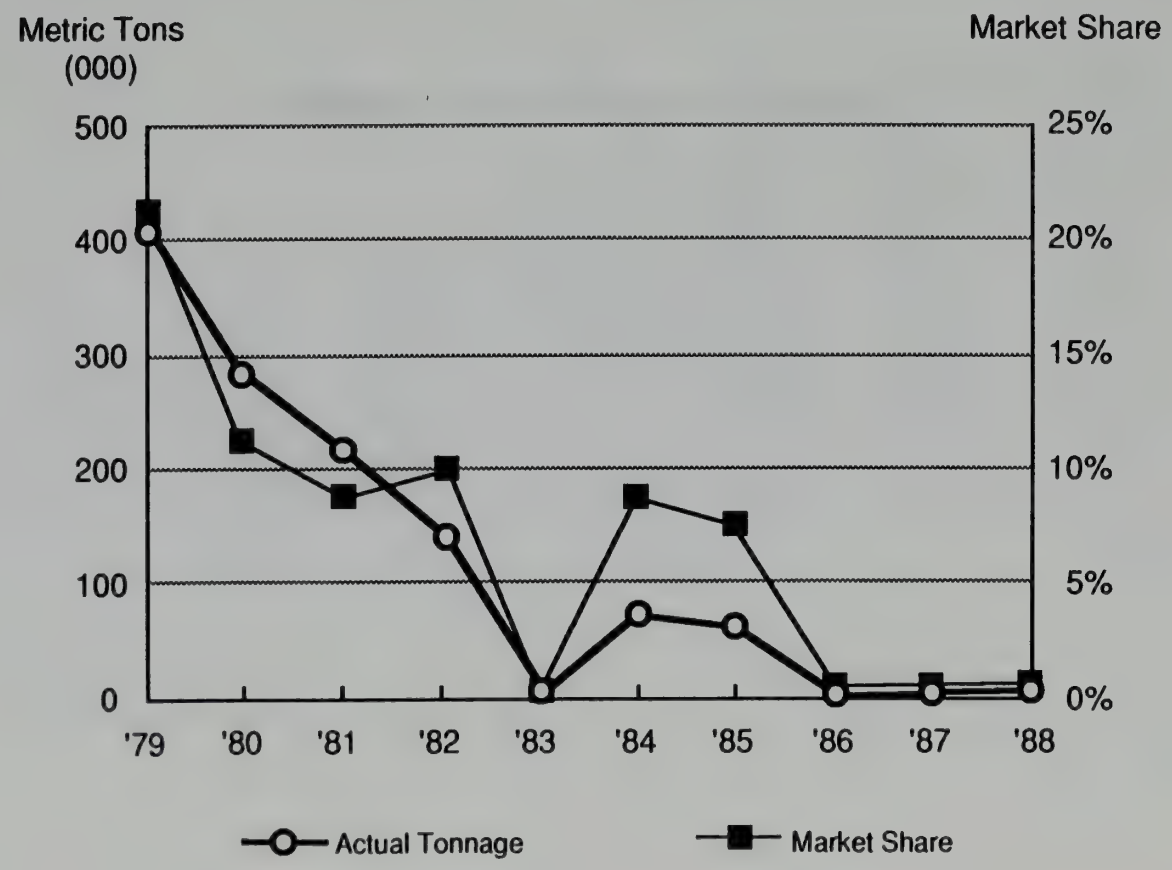
However export volumes of vegetable and animal oil have stabilized at 19,000 tons

San Francisco Vegetable And Animal Oil Exports Actual Tonnage And Share Of Northern California Market



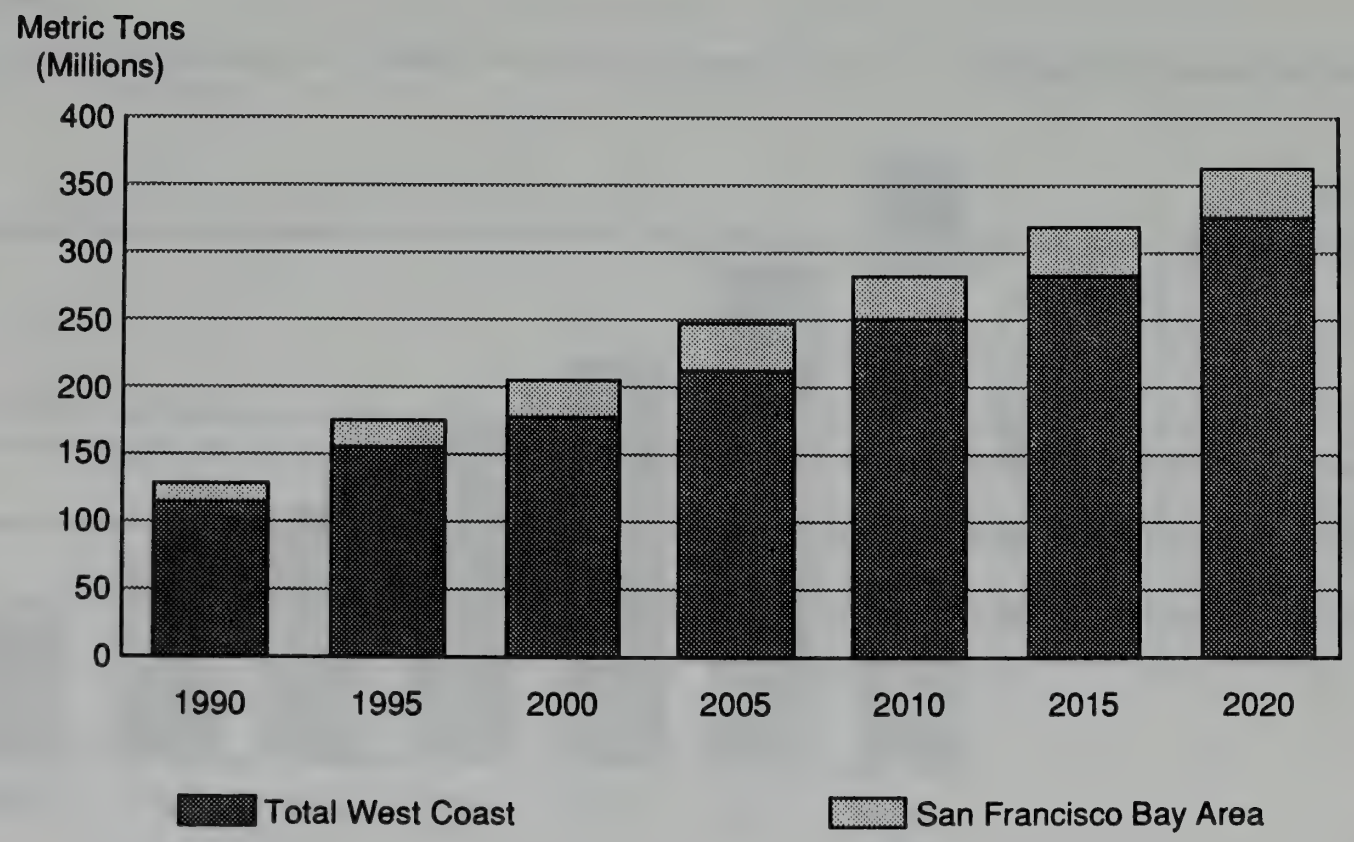
San Francisco's share in grain exports has all but been eliminated

San Francisco Grain Exports
Actual Tonnage And Share Of Northern California Market



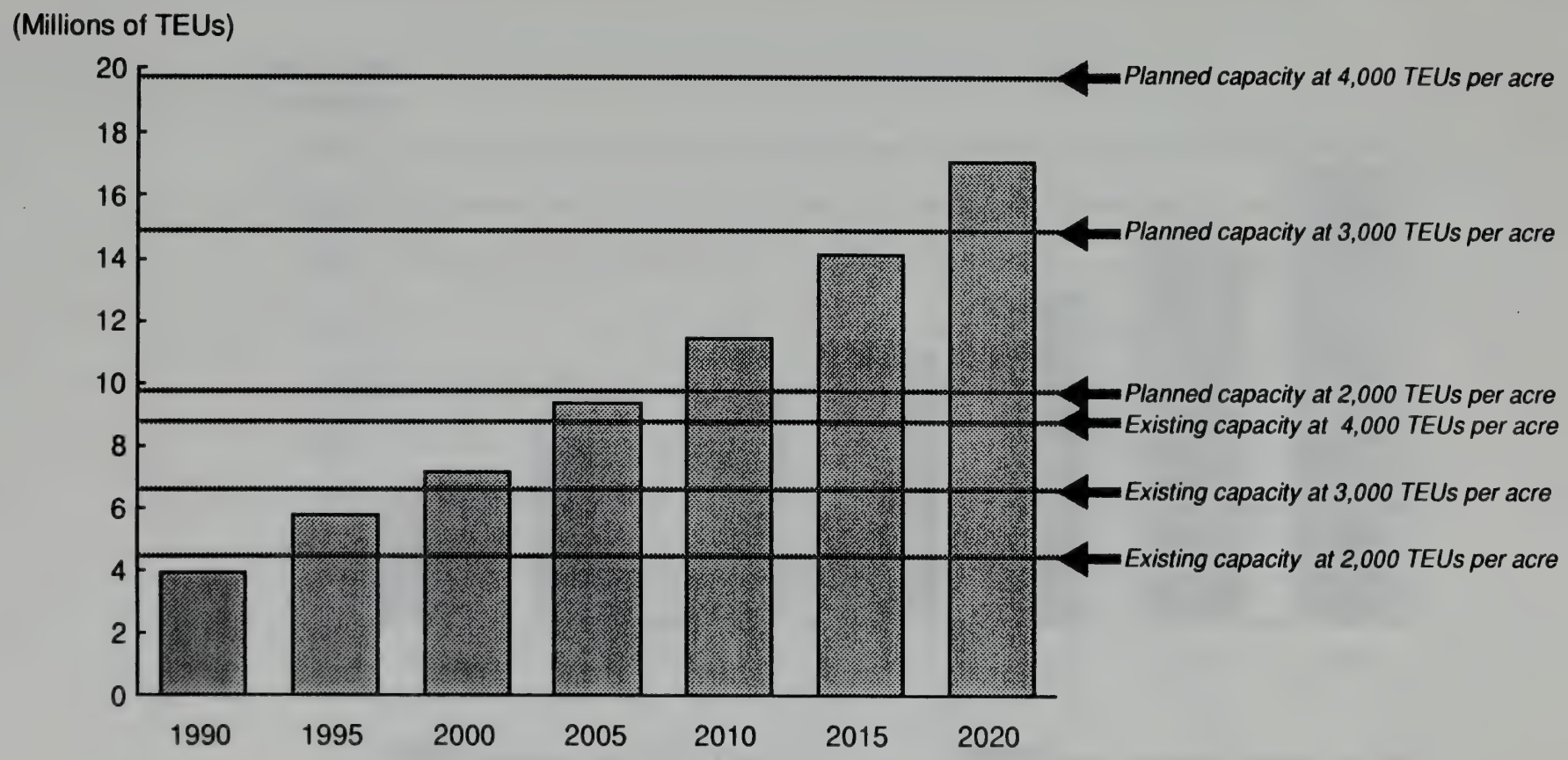
MARINE CARGO AGGREGATE FORECASTS

Total West Coast Dry Cargo Forecast



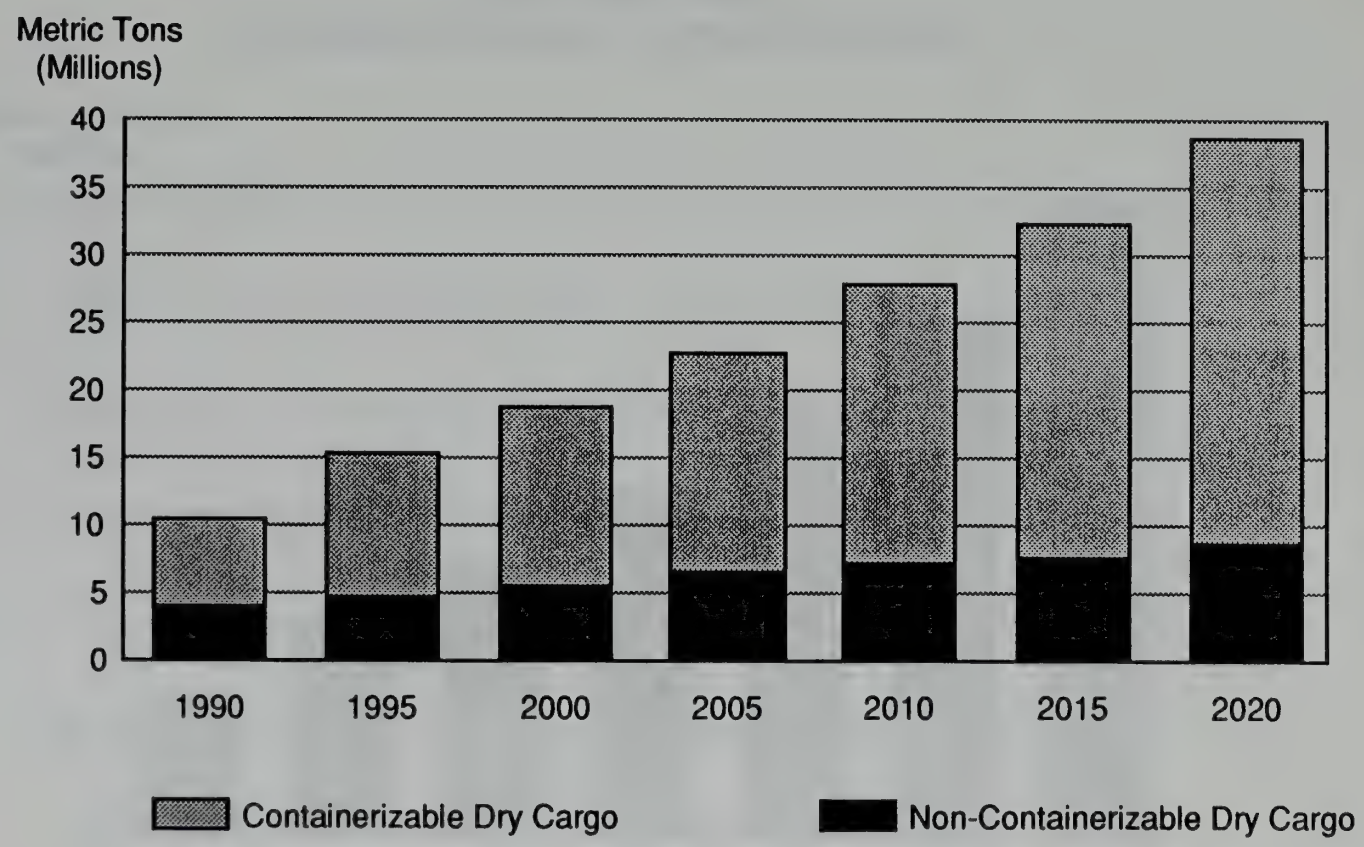
Source: 1988 Manalytics 2020 Cargo Forecast.

West Coast Container Forecast



Source: 1988 Manalytics 2020 Cargo Forecast coupled with BST capacity analysis.

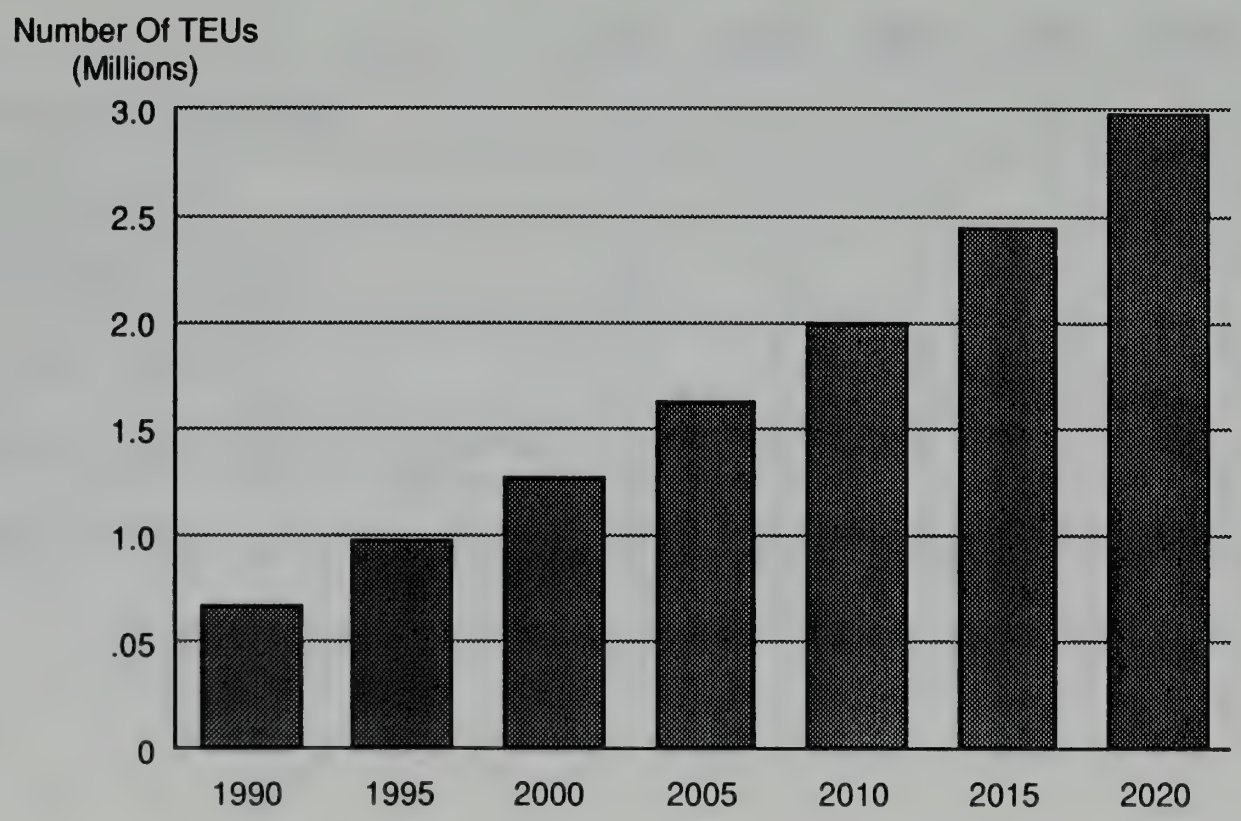
Bay area forecasts illustrate the diminishing importance of non-containerizable cargo over the next 30 years



Source: 1988 Manalytics 2020 Cargo Forecast.

The majority of the growth will come from the container market

Total Bay Area Containerizable Cargo Forecast



Note: TEUs in this forecast may differ from Port reported data.

Source: 1988 Manalytics 2020 Cargo Forecast.

These same forecasts illustrate the region's overcapacity for non-containerized dry cargo

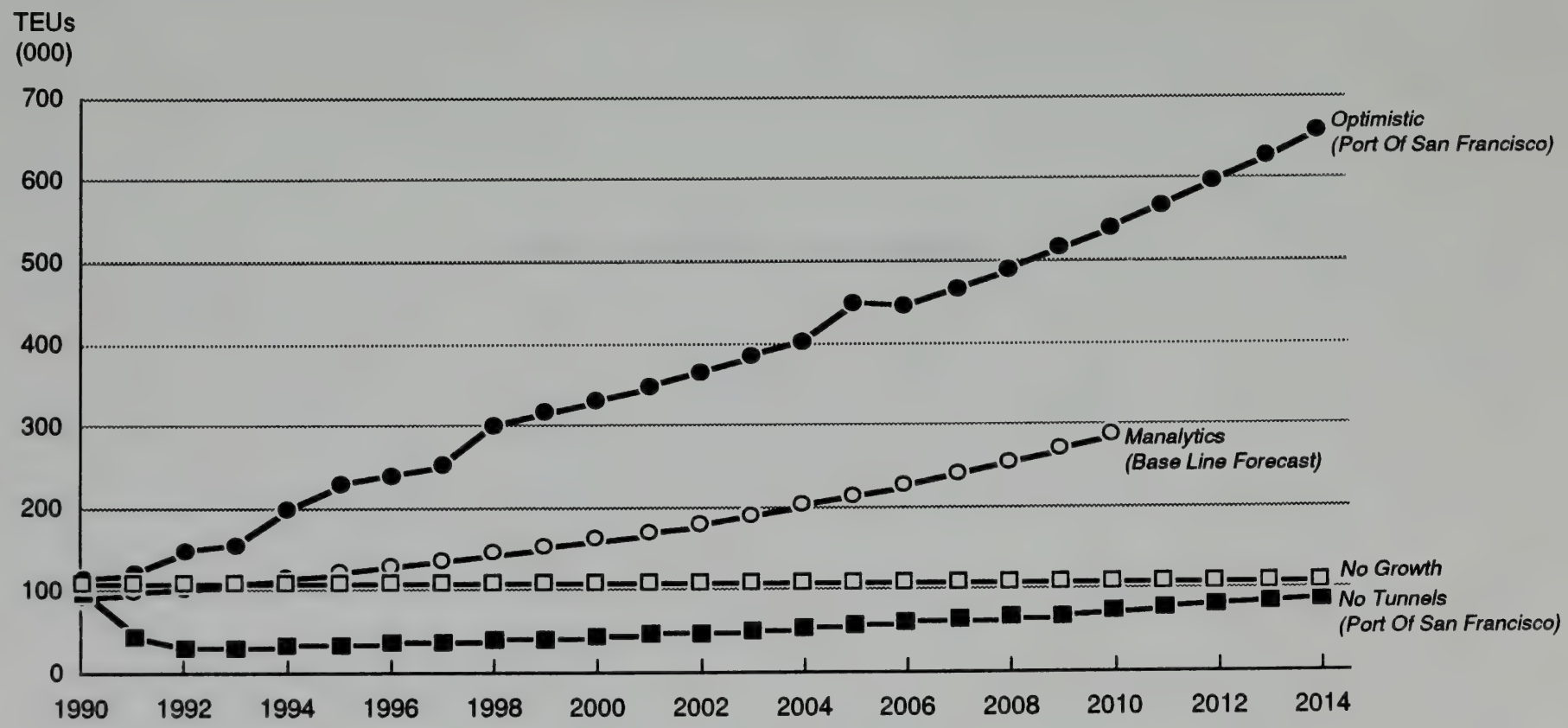
Total Bay Area Surplus Berths

	1990	1995	2000	2005	2010	2015	2020
Combination Break Bulk	10	9	9	7	5	3	0
Pure Break Bulk	4	4	3	3	2	1	0
Combination Neo Bulk	2	2	2	2	1	1	1
Pure Neo Bulk, Auto	4	4	4	4	3	3	2
Pure Neo Bulk, Steel And Newsprint	3	4	3	2	2	1	0
Pure Dry Bulk	2	1	0	(1)	(1)	(2)	(3)

Note: These surpluses are conservative; they were based on the high cargo volume forecast.

Source: 1988 Manalytics 2020 Cargo Forecast.

San Francisco Specific Container Forecasts: Imports And Exports



PORT COMPETITIVE ENVIRONMENT

West Coast container terminal capacity is planned to grow by over 130 per cent in the next 30 years

Region/Port	Acres Existing	Acres Planned	Acres Total	Existing Berths	Total Existing Berth Length (ft)	Existing Cranes
Pacific Northwest						
Seattle	306	104	410	18	15,767	25
Tacoma	167	330	497	5	3,740	12
Portland	83	50	133	3	2,850	2
Subtotal	556	484	1,040	26	22,357	39
Bay Area						
San Francisco	144	50	194	6	7,540	9
Oakland	399	91	490	19	14,573	22
Richmond	16	82	98	1	1,200	2
Encinal Terminals	0	41	41	0	0	0
Redwood City	0	58	58	0	0	0
Subtotal	559	322	881	26	23,313	33
Southern California						
Los Angeles	566	290	856	17	15,075	29
Long Beach	505	60	565	19	12,800	28
"2020 Plan"	0	1,700	1,700	0	0	0
Subtotal	1,071	2,050	3,121	36	27,875	57
Total West Coast	2,186	2,856	5,042	88	73,545	129

Seattle

ORGANIZATION STRUCTURE

The Port of Seattle is a separate political authority within King County that maintains powers of taxation and eminent domain. The Port is administered by five Commissioners elected at large by the voters of King County.

The internal organization is divided into several components responsible to the Commissioners and the Executive Director. The structure is as follows:

- Administration
  - Executive
  - Accounting
  - Budget and Finance
  - Development
  - EEO
  - Engineering
  - Human Resources
  - Information Systems
  - Labor Relations
  - Legal
  - Public Information
  - Purchasing
  - Risk Management
- Marine
  - Harbor Development and Relations
  - Marketing
  - Transportation Services
  - Marine Terminals
  - Marine Maintenance

- Aviation

  - Aviation Direct Management
  - Ground Transportation, Lost and Found, Parking
  - Airport Operations
  - Aviation Office of Tourism Development
  - Marketing

CONTAINER TERMINALS

Facility	Acres			Existing Berths	Total Existing Berth Length (ft)	Existing Cranes
	Existing	Planned	Total			
T5/APC+Westwood/ Eagle Marine	77	50	127	3	2,500	4
T18/Various/SSA	95	0	95	6	6,049	6
T25/Matson/Matson Terminal	28	0	28	2	1,580	6
T30/Mitsui-OSK/ TRAPAC	30	0	30	4	2,700	3
T37/NYK/SSA	26	0	26	1	886	2
T42/Various/SSA	25	0	25	1	950	2
T46/Hanjin/ITC	25	0	25	1	1,102	2
T90/91	0	54	54	0	0	0
TOTAL	306	104	410	18	15,767	25

EXPANSION PLANS

Terminal 18 On-Dock Rail Yard

In mid-1989, an on-dock rail facility was inaugurated at Terminal 18, to be operated by Stevedoring Services of America. While heralded as significant by the Port, the new facility is small and switching is subject to severe constraints. Some second generation double-stack equipment cannot be handled on the trestles linking Harbor Island with Burlington Northern's intermodal Seattle International Gateway (SIG) yard. Local transportation industry leaders have criticized the on-dock yard for these operational shortcomings.

In January 1990, Neptune Orient and Nippon Liner announced joint plans to dispatch one train per week with traffic from both carriers. In the winter of 1989, combined volumes of these lines had been about 100 FEU per week to Chicago. OOCL, the third member of the consortium, declined to participate, electing to wait until results of the NOL/NLS services were available.

Terminal 4 On-Dock Rail Yard

A new container terminal with an on-dock rail yard, to be known as Terminal 4, is planned for a 50-acre portion of an ex-Lockheed shipyard located in the northwestern portion of the harbor and is to be operational by January, 1992. It will be immediately north of the American President Lines facility (Terminal 5). There are currently no tenants committed to this new site.

Terminal 91 Project

The Port has explored converting a breakbulk/chill facility to container operations. Such a container terminal consumes between 50 and 100 acres. Plans have been blocked by two densely populated neighborhoods (Magnolia and Queen Anne) that overlook the property. Citizen groups have raised questions about noise, lights, and traffic congestion. Project status is uncertain but should not be ruled out as a potential increase in capacity.

RAIL SERVICE

- Burlington Northern
- Union Pacific

MARKETING

In addition to marketing existing and new facilities, Seattle takes a very active role in developing and marketing its own value-added services programs largely run by Port staff and within Port warehousing and transloading facilities. These service programs include:

- Warehouse and Distribution
  - Port provides space to relabel, repackage, and rework goods.
  - The Port also processes and ships orders.
- Truck Contracts
  - Port-sponsored distribution system operated through nine contract carriers.
- Truck Exports
  - Oriented toward U.S.-Canadian LTL shipments (similar to Truck Contract Program).
- Container Freight Station (Terminal 106)
  - Port operated with detached Customs Exam Site.
  - Used by small shippers with some space leased to large distributors (e.g. Hasbro Toys).
- Rail
  - The Port serves as shipper's agent to negotiate volume rail rates for customers.
- Sea-Air Cargo
  - Port provides low air-truck rates for incoming cargo bound for inland points.

Pricing Policies

The Port of Seattle's pricing policies are similar to those of the Southern California Ports of the 1970's - growth oriented and based on flat rate long term leases. Pricing is generally not keyed to line revenues and volumes.

- Terminal 4 infrastructure improvements.

- Mitigation projects for the above construction.

Terminal 7 Improvements

At present, these center primarily around providing greater container storage space. In late 1989, the Port completed demolition and relocation of the tallow farm adjacent to the container terminal to provide for greater storage. Further plans include:

- Paving of areas around the Kaiser alumina domes to provide for greater container storage.

- Apron and pier extensions.

- Crane improvements.

The Port of Tacoma would like to remove the Kaiser alumina domes from Terminal 7 but has not been successful to date. Under one plan, they would be relocated to the Port of Kalama, on the Columbia River. This is a complex process involving Kaiser, the BN Railroad, and both Ports.

North Intermodal Rail Yard

Provision for additional track capacity for a third 28-car double stack train and a yard control tower.

Blair Waterway

These improvements center on two areas. The first is the widening of the Waterway Channel, which would be accompanied by removal or enlargement of an existing drawbridge. The second is the transformation of one, two, or more conventional facilities within the Waterway (probably Blair and Pierce County Terminal) for container use. The extent of such transformation and the size and scale of such a facility could be approximated at 250 acres.

Tacoma Terminals, Inc.

Material removed from the Blair Waterway may be used to fill portions of the Milwaukee Waterway area to provide for expansion of the Sea-Land terminal (Tacoma Terminals, Inc). In the meantime, facility improvements scheduled for the 1988-1990 period include a 200 ft. pier extension, which may be enlarged to 400 ft.

PRODUCTIVITY IMPROVEMENT INITIATIVES

In light of its physical constraints, the Port of Seattle has attempted to increase productivity at existing terminals and to make those physical changes that promise improved throughput while incurring relatively minor costs. For several years, the Port of Seattle has been implementing the Container Terminal Utilization Program. This is directed by the Seattle Maritime Committee, a Port-sponsored entity that includes representatives of trucking companies, stevedores, terminal operators, railroads, steamship lines, and others.

This is a two-step program. Phase I, which was recently completed, identified procedures most likely to result in productivity gains. Phase II implementation plans include:

- Flexible hours geared to ship schedules
- Paperless gates to expedite traffic
- Off-dock storage areas for westbound empties
- Future terminals designed for five or six high container stacking
- Dedicated truck corridors (piers to rail yards).

According to the Port, terminal operators and others will be expected to contribute to the financing of these projects. Costs and expected levels of productivity gain are not publicly available.

Tacoma

ORGANIZATION STRUCTURE

The Port of Tacoma is similar to Seattle in its political constitution and authority. However, there are fundamental differences. Tacoma is oriented toward the largest shippers. The Port itself maintains a relatively small staff, providing fewer supporting services for shippers. Tacoma also has to face much weaker opposition to infrastructure expansion, which has generally taken place in a supportive political climate.

Internally, there are four departments grouped under its Commission and Executive Director:

- Operations/Marketing
  - Trade Development
  - Marketing Services
  - Terminal Operations
  - Terminal Services
  - Port Relations
- Finance and Administration
  - Finance
  - Budget and Internal Audit
  - Information Systems
  - Personnel
  - Safety and Claims
  - Security
- Facilities
  - Engineering
  - Maintenance
  - Port Development
  - Purchasing
  - Strategic Planning
- Legal

CONTAINER TERMINALS

Facility	Acres			Existing Berths	Total Existing Berth Length (ft)	Existing Cranes
	Existing	Planned	Total			
T4/Port of Tacoma	49	0	49	2	1,420	4
T7D/"K" Line/Husky Terminals	32	0	32	1	720	3
Tacoma Terminal/ Sea-Land	86	25	111	2	1,600	5
Industrial Yard	0	35	35	0	0	0
Blair Waterway	0	250	250	0	0	0
Other	0	20	20	0	0	0
TOTAL	167	330	497	5	3,740	12

EXPANSION PLANS

Bounded by tideflats, vacant land, and low density industrial areas, the Port of Tacoma is more able to grow than is its northern counterpart, which conducts its activities surrounded by high density residential, office, and industrial properties.

Terminal 3/4 Project

Tacoma is planning a significant expansion of its container and intermodal facilities at several adjoining sites:

- Construction of a 950 ft. apron at Terminal 3, as well as filling of an adjacent slip (Slip 2) and finger pier to provide expanded area for container storage and loading.
- A 360 ft. extension to the existing apron of Terminal 4.
- Relocation of the fishing fleet to a new location away from marine cargo terminals (on the City waterway).

RAIL SERVICE

- Burlington Northern
- Union Pacific

MARKETING

Tacoma is using expansion opportunities as a lever in marketing its facilities. The Port of Tacoma is oriented toward serving larger shippers and allowing them to control their own terminal facilities (e.g. Sea-Land, Maersk, "K" Line). This is expected to continue as Tacoma develops new facilities.

Pricing Policies

Tacoma's pricing policies are roughly similar to Seattle's - growth oriented and based on flat rate leases instead of line revenues. Unlike Seattle, Tacoma has usage-based crane charges, which are higher than Seattle's.

Portland

ORGANIZATION STRUCTURE

As the only nationally prominent port in Oregon, Portland has very close ties to state government, which established the Port of Portland in 1891. At about the same time, the City of Portland developed facilities under its own control which were administered by the Commission of Public Docks. In 1970 the State Port and the City Commission were merged to form a new municipal corporation called the Port of Portland, which has attributes of both a state and local agency.

The administration of the Port of Portland reflects the dual influences of state and local government. The Governor appoints a nine-member Board of Commissioners, which is approved by the state Senate for four-year terms. At the same time, the Port's power to levy a property tax is limited to the City of Portland and the surrounding tri-county region. The internal organization is divided as follows:

- Executive Department
  - Administration
  - Public Affairs
  - Human Resources
  - Legal
- Finance and Administration
  - Administration
  - Controller
  - Finance
  - Administrative Services
  - Management Information Systems
- Engineering Services
  - Administration
  - Construction Management
  - Design Engineering
  - Project Management
  - Technical Services

- Marine
  - Administration
  - Marine Terminals
- Ship Repair Yard
  - Dry Dock 4
  - Dry Docks 1, 2, 3
- Real Estate Management and Development
  - Administration
  - Industrial Parks
  - Industrial Revenue Bonds
  - Project Development
  - Steamer Portland
- Commercial Aviation
  - Administration
  - Portland International Airport
- General Aviation
  - Portland - Hillsboro Airport
  - Portland - Troutdale Airport
  - Portland - Mulino Airport
- Navigation
  - Dredge Oregon
  - Navigation/River Support
- Transportation Fund
  - Transportation

CONTAINER TERMINALS

Facility	Acres			Existing Berths	Total Existing Berth Length (ft)	Existing Cranes
	Existing	Planned	Total			
T6/Port of Portland	83	50	133	3	2,850	2
TOTAL	83	50	133	3	2,850	2

EXPANSION PLANS

Portland's marine facility expansion plans are relatively modest. As shown below, the emphasis is on airport improvement.

The principal exception to date is the enlargement and diversification of the principal container terminal, T6, and eventual conversion of T5 to container operation. This would be accompanied by rail construction linking Burlington Northern and Union Pacific operations on the peninsula. Current major projects and 1989-90 costs include:

- Portland International Airfield and Terminal Improvements ($9,800,000)
- Portland International Air Cargo Facility Improvements ($9,700,000)
- Terminal 6 Hyundai Auto Facility ($11,170,000)
- Portland International Center ($2,240,000).

Some attention has been paid to shipbuilding and maintenance capabilities in the Port's Ship Repair Yard. Approximately $7 million in capital outlay recorded in the Bond Construction Fund and the Shipyard and Dry Dock Construction Fund is in four principal areas:

- General rehabilitation: $956,000
- Maintenance and Replacement: $1,199,000
- Lagoon Fabrication Site: $1,700,000
- Project Specific: $3,200,000.

Much of the Port's emphasis has been on development of real estate and industrial properties on Port lands. This includes the following, covered by a capital outlay of about $7.3 million in the Bond Construction Fund:

- Streets and utilities in the Rivergate industrial development area
- Swan Island, Mocks Landing, and Port Center master plans and preliminary infrastructure developments
- Portland International Center streets, landscaping, utilities, and planning.

RAIL SERVICE

- Burlington Northern
- Union Pacific
- Southern Pacific (short distance away).

MARKETING

Unable to attract first port of call business, Portland has traditionally engaged in extremely competitive pricing in comparison with Puget Sound ports. At the same time, Portland has a long tradition of being an operating port and has tended to stay clear of exclusive operating agreements with terminal management and stevedoring companies. Steamship lines calling at leased terminals can specify a stevedore, including the Port, should they choose to do so. Portland is also attempting to create a warehouse and distribution program to attract import containers. It is also attempting to renegotiate trackage agreements, enabling Southern Pacific to reach into areas (notably the Rivergate Industrial Complex) now served only by Burlington Northern and Union Pacific.

As a state agency, the Port of Portland exhibits a greater degree of cooperation with regional ports and other entities than is commonly seen on the West Coast. Such cooperation may be viewed as an attempt to counteract the influence of Puget Sound ports, which traditionally have attracted significant amounts of cargo from eastern Washington, Oregon, and Idaho, areas that Portland considers as its hinterlands.

Portland is a member of the Columbia/Snake River Marketing Group, an association of over 30 local river ports, some of which are very small. The Port of Portland pays about one-half of the Group's expenses. Much of the dry bulk cargo handled at the Port is generated by the river system, which also is responsible for about 20% of Portland's export container cargo.

The Port is also involved in the Columbia River Shippers Association (CRSA), which is composed of local shippers and has a Port representative on its governing board. The Association has anti-trust immunity, which allows it to engage in collective bargaining with ocean carriers serving the Port. In part, this is an ongoing attempt to capture first port of call business. CRSA has only met with limited success.

Oakland

ORGANIZATION STRUCTURE

The Port of Oakland is governed by a seven-member Board of Port Commissioners nominated by the Mayor and appointed by the City Council to staggered four-year terms. This is virtually the only formal institutionalized control that the City has over day-to-day Port activities.

Under its Board of Port Commissioners are the Chief Executive Officer and two Executive Directors heading up Transportation Services and Real Estate And Planning. This structure represents a recent reorganization, thus the detailed functions below are tentative and may not represent the reporting relationships.

Transportation Services

- Aviation
  - Manager of Airports
  - Air Traffic Development
- Maritime Activities
  - Marine Terminals
  - Cargo Marketing
  - Traffic Management
- Engineering
  - Capital Improvements Program
  - Planning (Physical)
  - Design
  - Electrical-Mechanical
  - Construction
  - Facilities Maintenance

Real Estate And Planning

- Properties
  - Development
  - Management

Other

- Finance
  - Accounting
  - Budget Preparation/Performance
  - Financial Management
  - Cash Flow Analysis
- Administration
  - Personnel/Training
  - Data Processing
  - Purchasing/Office Services
  - Risk Management
  - Equal Opportunity
- Public Affairs
  - Government/Community Relations
  - Public Information
  - Promotional Support
- Legal
  - Counsel
  - Agreements
  - Leases
  - Contracts

CONTAINER TERMINALS

Facility	Acres			Existing Berths	Total Existing Berth Length (ft)	Existing Cranes
	Existing	Planned	Total			
Sea-Land Terminal	60	0	60	2	1,355	3
Public Container Terminal	55	0	55	2	1,839	3
Maersk Terminal	43	0	43	1	900	2
7th St./Marine Terminals Corp.	51	0	51	4	3,237	3
Matson Terminal	66	0	66	3	2,200	3
APC Terminal/ Eagle Marine	75	0	75	4	2,743	5
Howard Terminal/SSA	49	0	49	3	2,279	3
Carnation Terminal	0	24	24	0	0	0
Bay Bridge Terminal	0	67	67	0	0	0
TOTAL	399	91	490	19	14,573	22

EXPANSION PLANS

Intermodal Rail Yard Development

Should the On-Dock Demonstration Project prove successful, the Port of Oakland envisions a much larger facility growing out of the yard. It would essentially wrap around the back of existing marine terminals and have loading tracks up to 12,000 ft. long, according to the conceptual design formulated by Vickerman, Zachary & Miller.

Carnation Terminal

The planned Carnation Terminal at Berth 35 and adjacent to the damaged Seventh Street Terminal is emblematic of a strong trend in the intermodal industry - a steamship line controlling its own terminal activities. Initially, over a dozen steamship lines expressed interest in entering into a joint terminal venture with the Port of Oakland. The Port eventually entered into negotiations with three transpacific container carriers (Mitsui-OSK, NYK, and Hyundai), and an agreement was reached with Mitsui-OSK in December, 1989, to begin exclusive negotiations. The 12.6-acre terminal (with 3.4 acres available for additional expansion) will have two Post-Panamax cranes and is targeted to cost $42-$45 million (exclusive of cranes). Since it is connected to Seventh Street, three cranes from this facility will be able to move via a continuous crane rail system to Carnation Terminal on a supplemental basis. Like all other terminals at the Port of Oakland, Carnation is within a mile of the Southern Pacific and Union Pacific intermodal rail yards. While Carnation Terminal is relatively small, it should be noted that the facility is only the beginning of an ambitious two-year plan to build a much larger terminal complex around it, according to TRAPAC, Mitsui-OSK's terminal management company. Details of Mitsui's expansion plans are not publicly available.

Other Future Facilities

A new container facility has been proposed for property immediately south of the Bay Bridge at the northern edge of Port property. Preliminary studies have indicated the need for a 35- to 50-acre facility, but these plans are considered dated. New studies will be undertaken and all such plans should be considered tentative.

RAIL SERVICE

- Santa Fe
- Union Pacific
- Southern Pacific

MARKETING

The marketing strategy shares some similarities with Tacoma - a concentration on larger lines, allowing them to operate their own dedicated facilities and helping to provide infrastructure to support their intermodal networks. The Port also markets the growth

potential of the East Bay communities and their increasing concentration of population and growing distribution and transport capabilities. This is especially true along the I-80 and I-880 corridors, where the Port has actively pursued development, acting as a liaison with shippers and others wishing to locate in these areas - which often are far outside the Port itself.

Pricing Policies

Until the mid-1950's, Oakland largely operated its own facilities. In the latter part of the decade, the Port began to lease facilities to private operators using a flat rate structure. Later, this changed, with Oakland participating in a broad range of revenue sharing type agreements with private operators. These are generally designed to maximize revenue over the long term and to keep lines as long-term tenants.

PRODUCTIVITY IMPROVEMENT INITIATIVES

Over the long term, Oakland may face increasing physical constraints. Port planners are investigating higher stacking and other less land intensive solutions, although Oakland has yet to formulate a strategy as comprehensive as that of Seattle.

OTHER

Lines and Terminals Configuration

Oakland tenants include some of the world's largest steamship lines, often with significant intermodal capabilities - American President, Maersk, and Sea-Land - as well as many middle-ranking carriers.

Container terminals are arranged in a rough crescent shape from north to south along the outer harbor and then from west to east along the middle and inner harbor channels. Intermodal rail yards are found within this crescent on the landward wide. There are three such yards.

One belongs to the Southern Pacific, located adjacent to the Howard and American President Lines Terminals on the south and east and close to the Public Container Terminal, Maersk Line Terminal, and TransBay Container Terminal to the northwest. The Union Pacific yard is located immediately west of the American President Lines Terminal. The Port of Oakland's Intermodal Rail Facility Demonstration Project Site is located next to four marine terminals - TransBay, Maersk, Public, and Sea-Land. Plans call for this new facility to be accessible to all three transcontinental rail carriers serving the Bay area

- Southern Pacific, Union Pacific, and Santa Fe. Currently, access to the Santa Fe is somewhat less convenient, and containers need to be drayed nearly to Richmond, where that railroad maintains its intermodal yard.

While steamship lines often do not use the railroad closest to their marine terminals as their primary inland carriers, it should be stressed that all of Oakland's container terminals are relatively near all three of the yards mentioned above. None are more distant than about 1.5 miles from any existing rail facility. In addition, they are efficiently joined by a network of streets that primarily handle high volumes of containers shuttling between marine and rail terminals.

Dredging

At present, the largest container vessels entering Oakland draw slightly upwards of 40 ft. when fully laden. Conditions prevent some of these ships, especially those of American President Lines and Maersk, from serving Oakland with full cargoes. The need for dredging is greatest in the middle and inner harbor.

The Port is attempting to dispose of its dredge spoils in the delta area. However, these plans are being temporarily thwarted by a lawsuit concerning water quality. The lines that are being impeded by shallow water are active participants in the solution, further renewing their support for Oakland. This dredging problem is viewed as a short-term impediment rather than a long-term constraint.

Earthquake Damage

Damage was most severe at the Seventh Street Public Container Terminal, where repair costs may reach $60 million. The "batter piles," that is, those diagonally mounted and designed to resist lateral motion of the structure, were sheared or weakened. Repair of the batter piles is a major undertaking and will probably involve removal of portions of the overlying terminal. The wharf, the paved container yard above, and the container crane rails also received damage.

Emergency repairs have been made to the terminal's surface and structures. Approximately 90% of the damage should be repaid by FEMA. The Port of Oakland estimates that the Seventh Street Terminal will be repaired within a year. These repairs will include about 60 acres of container yard, the addition of three Post-Panamax and three other cranes, and three berths with a combined length of 3,143 ft. Hanjin, a primary user, is being accommodated by the Port and has not vacated the facility, although it is difficult to ascertain exactly how the disruption of pre-existing traffic patterns has affected the line's operations.

Other Bay Area Ports

In addition to planned container terminals in Oakland and San Francisco, several sites have also been mentioned as potential container terminal sites in other Bay Area locations, namely Richmond, Encinal, and Redwood City. These sites are quantified below.

CONTAINER TERMINALS

Port	Acres			Existing Berths	Total Existing Berth Length (ft)	Existing Cranes
	Existing	Planned	Total			
3/CS&B (Richmond)	16	0	16	1	1,200	2
Encinal Terminals	0	41	41	0	0	0
Redwood City	0	58	58	0	0	0
Other Sites (Richmond)	0	82	82	0	0	0
TOTAL	16	181	197	1	1,200	2

Southern California: Joint Los Angeles/Long Beach Efforts

Southern California ports have the most ambitious physical expansion plans of any region on the West Coast. Both employ strategies designed to attract very large lines that operate their own terminals. Although projects are now being built, both Los Angeles and Long Beach are attempting to increase productivity at existing facilities.

The adjacent Southern California ports of Los Angeles and Long Beach dominate West Coast container traffic. As such, they have enormous throughputs and suffer from considerable congestion. They are also at the heart of a growing population and industrial region. Because of their proximity and common problems, the level of cooperative effort and planning is relatively high. At the same time, both ports remain independent and are involved in separate expansion plans and marketing policies. The cooperative plans will be discussed first, with an emphasis on planned physical infrastructure ("2020 Master Plan and the Consolidated Transportation Corridor), followed by individual efforts at each port. Both ports are served by Union Pacific, Southern Pacific, and Santa Fe railroads.

LOS ANGELES AND LONG BEACH COOPERATIVE EFFORTS

- The "2020" Master Plan
- The Consolidated Transportation Corridor
- The Southern California Rail Express (SCORE) proposal to consolidate traffic for second and third tier carriers
- The Ports Access Demonstration Project
- The Southern California Automated Commercial System (ACS) to study future computerized expediting of cargo movements
- Joint operations staff meetings on an intermittent basis
- Combined lobbying
- Unified marketing and pricing strategies for certain facilities
- A joint powers agreement for the Foreign Trade Zone

- Joint participation in the administration of the Greater Los Angeles World Trade Center.

The "2020 Plan"

Los Angeles and Long Beach have embarked on a joint expansion program known as the 2020 Plan, designed to provide capacity to accommodate planned growth well into the next century. Traffic is assumed to double in the next 30 years. According to WEFA, this may be as high as 11.7 million TEU by 2020. The focus is primarily on handling containers and secondarily on autos/neobulks, dry bulk, and liquid bulk traffic. According to the Port of Los Angeles, cost for the complete plan is about $4.6 billion.

The 2020 Plan is characterized by its ambition and large scale. There are two alternate development options (Scheme A and Scheme B) that differ principally in the layout of new Long Beach facilities.

In addition to new container terminals in both ports, the plan envisions added transportation infrastructure, both road and rail, to expedite very large traffic volumes through the congested environment of Southern California. Some of this infrastructure would be added in each port, while other facilities would handle traffic of both ports, moving it over dedicated road and rail corridors.

This jointly shared transportation infrastructure is the portion of 2020 that has progressed most readily. As of January, 1990, Requests For Proposals had been placed for initial engineering and planning of the Consolidated Transportation Corridor (CTC). This includes the construction of double main line track and a six-lane limited access highway linking the ports with existing rail main lines and freeways. Total project completion is targeted at 10 years.

Under the 2020 Plan, Long Beach and Los Angeles will create the following infrastructural improvements:

- 38 new container terminals
- 50 new berths
- 2,400 acres of new landfill
- 50 to 85 ft. deep channels resulting from 225 million cubic yards of dredging

- New on-dock rail terminals and connecting trackage.

Under Schemes A and B, new facilities of all types will be allocated to both ports on nearly equal basis.

Los Angeles has begun engineering work on Pier 300 on Terminal Island, a planned 190-acre terminal including container and dry bulk facilities. Existing dry bulk facilities will be consolidated here in 1993. Preliminary planning has begun for Pier 400, oriented toward liquid bulks.

Long Beach's approach to the 2020 Plan differs from that of Los Angeles in that it has an alternative to large-scale dredging and fill in the Outer Harbor in order to accommodate planned growth in container traffic. The upland property in the Cerritos Channel, currently used as an oil field, could be cleaned and transformed into container or other facilities. The Port of Long Beach has indicated that such new terminals could be obtained at significantly lower cost than those built under 2020, although there are no public estimates of comparative development costs.

The 2020 Plan entails great cost and will require a significant amount of environmental mitigation, much of which will have to be done far off site. An early example of this is the 526-acre Batiquitos Lagoon habitat restoration project near Carlsbad, south of the Port.

ORGANIZATION STRUCTURE

The Port of Long Beach enjoys a high degree of autonomy and self-direction due to a history of private involvement in the Port area. It is organized along the following functional lines:

- Executive
- Administrative Services
- Trade Development
- Engineering, Design, and Development
- Planning
- Finance
- Public Relations

CONTAINER TERMINALS

Facility	Acres			Existing Berths	Total Existing Berth Length (ft)	Existing Cranes
	Existing	Planned	Total			
Pier C/California United Terminal	96	0	96	4	1,950	4
Pier A/LBCT, Inc.	85	0	85	3	2,700	4
Pier G/Sea-Land	109	0	109	4	2,550	7
Pier J (Berths 232-4)/ITS, Inc.	104	0	104	3	2,300	6
Pier J (Berths 243-4)/Maersk	45	0	45	2	1,200	3
Pier J (Berths 245-7)/PCT, Inc.	66	0	66	3	2,100	4
Hanjin	0	60	60	0	0	0
TOTAL	505	60	565	19	12,800	28

EXPANSION PLANS

Aside from 2020, Long Beach is involved in planning several major infrastructure developments. Permits have been granted for the following:

- A new 60-acre Hanjin terminal (Seventh Street Peninsula), construction of which is progressing
- A near-dock rail yard for "K" Line (Pier J)
- Expansion of an existing near-dock yard adjacent to the Long Beach Container Terminal (Pier A).

OTHER

The ability to fund infrastructure improvements is very strong. In 1988, its capital reserve had accumulated to $190 million. Operating income has nearly doubled over the past six years, reflecting increased traffic and new market sensitive pricing policies. Net income has more than doubled over the past four years.

Bonding capabilities are also very well developed. In 1987, Standard & Poor's revised the Port's bond rating from "A+" to "AA-," citing diverse sources of revenue, a manageable capital program, strong demand, and excellent financial performance. The Port survives without ad valorem tax support and has paid the City of Long Beach ($6.5 million in 1987) for services provided by City agencies to the Port. However, indirect subsidy comes from several sources. For example, the Port's Access Demonstration Projects are funded by Congressional appropriations in combination with ten local communities, and the Consolidated Rail Corridor is partially funded by federal, state, and regional entities.

Los Angeles

ORGANIZATION STRUCTURE

The Port of Los Angeles functions as a semi-autonomous department of the City of Los Angeles and must be very responsive to local city officials and policy changes. The Port of Los Angeles is governed by a five-member Board of Harbor Commissioners appointed by the Mayor and approved by the City Council to staggered five-year terms. The Port must submit all tariff rate increases, revenue bond issues, and long-term leases to the City Council for their approval. All Port employees, except the very top layer of administration comprising less than ten persons, are members of the City Civil Service system. Despite close ties, the Port enjoys substantial autonomy.

Internally, the Port of Los Angeles is organized along the following lines:

- Administrative
  - Executive
  - Planning and Research
  - Government and Community Relations
  - Advertising and Marketing Promotions
  - Property Management
  - Environmental
  - Purchasing
- Finance
- Engineering and Operations
- Legal
- Marketing
  - International (LA)
  - Overseas
  - Domestic.

CONTAINER TERMINALS

Facility	Acres			Existing Berths	Total Existing Berth Length (ft)	Existing Cranes
	Existing	Planned	Total			
APC Terminal/Eagle Marine	112	0	112	2	1,100	5
Evergreen Terminal/ Metropolitan	118	0	118	4	3,900	5
Public Terminal (Berths 89-90)/Port of Los Angeles	25	0	25	1	800	2
Indies Terminal/ Various/SSA	99	0	99	2	3,000	4
Public Terminal (Berth 131)/Port of Los Angeles	18	0	18	1	800	2
Matson Terminal/ Matson	92	0	92	3	2,100	5
Hanjin Terminal/ Marine Terminals Corporation	32	0	32	2	1,600	2
TRAPAC Terminal/ Mitsui-OSK	70	0	70	2	1,775	4
Berth 300	0	190	190	0	0	0
NYK	0	100	100	0	0	0
TOTAL	566	290	856	17	15,075	29

EXPANSION PLANS

Aside from the 2020 Plan, there are two major ongoing infrastructure projects:

- A new 100-acre NYK terminal now under construction
- A near-dock rail yard next to the above terminal and accessible to all three railroads.

PRICING POLICIES

In the 1980's, Los Angeles went from flat rate leasing policies designed to attract cargo to revenue sharing lease agreements. This move reflects both its security as an established load center and the political pressure to moderate its large revenues.

OTHER

The Port of Los Angeles has an unequalled ability among West Coast ports to produce investment funds from internal operations. This is enhanced by the diversification of its cargo facilities and its property rentals. These revenues are so great in comparison to those of other municipal authorities that there is considerable political pressure to reduce them. One way to do this is by channeling them into an ambitious investment program.

In early 1988, the Port's debt rating was raised to the highest of any municipal authority in the nation lacking taxing abilities (to "AA-" by Standard & Poor's and to "AA" by Moody's).

The Port receives some subsidies, mainly from the Federal Government for navigational improvements, partial contribution to the 2020 Plan, the Cabrillo Beach complex, and the transport demonstration access programs. There have also been subsidies from the State of California for marina construction. The City of Los Angeles has also contributed relatively small amounts to fire protection, sewage outfall construction, and other ancillary services.

WEST COAST PORT FINANCIAL PERFORMANCE

San Francisco

	1983	1984	1985	1986	1987	1988
	Thousands					
Operating Revenues (OR)	$26,360	$27,621	$29,121	$29,411	$29,457	$29,745
Operating Expenses (OE)	16,842	15,248	19,829	21,033	23,155	21,762
NET OPERATING INCOME (NOI)	9,518	12,373	9,292	8,378	6,302	7,983
Non-Operating Revenues	3,442	2,839	3,365	3,193	3,025	15,640
Non-Operating Expenses	3,516	3,203	3,002	2,889	2,892	3,133
NET OPERATING INCOME "A" (NI"A")	9,444	12,009	9,655	8,682	6,435	20,490
Depreciation	3,125	3,277	3,824	3,631	4,129	3,829
NET OPERATING INCOME "B" (NI"B")	6,319	8,732	5,831	5,051	2,306	16,661
Tax Revenues	0	0	0	0	0	0
NET OPERATING INCOME "C" (NI"C")	6,319	8,732	5,831	5,051	2,306	16,661
Net Capital Assets (NCA)	165,404	168,085	169,407	167,389	167,063	173,430
Total Assets (TA)	196,816	197,815	242,613	247,210	248,139	247,366
OPERATING ACTIVITY INDICATORS						
Operating ROI (NOI/NCA)	5.75%	7.36%	5.49%	5.01%	3.77%	4.60%
Operating Margin (NOI/OR)	36.11	44.80	31.91	28.49	21.39	26.84
Operating Ratio (OE/OR)	63.89	55.20	68.09	71.51	78.61	73.16
OTHER ROI INDICATORS						
ROI "A" (NI"A"/TA)	4.80	6.07	3.98	3.51	2.59	8.28
ROI "B" (NI"B"/TA)	3.21	4.41	2.40	2.04	0.93	6.74
ROI "C" (NI"C"/TA)	3.21	4.41	2.40	2.04	0.93	6.74

Operating Revenues By Source - San Francisco
Dollars in Thousands

Category	1987	% Total	1988	% Total	% change 1988/87
Property Rentals, Commercial	$16,607	56.4%	$17,358	58.4%	4.5%
Property Rentals, Maritime	4,929	16.7	4,507	15.2	-8.6
Wharfage, Dockage & Demurrage	5,670	19.2	6,264	21.1	10.5
Commercial Power	923	3.1	1,023	3.4	10.8
Other	1,328	4.5	593	2.0	-55.3
Total	$29,457	100.0%	$29,745	100.0%	1.0%
Maritime	$10,599	36.0%	$10,771	36.2%	1.6%
Non-Maritime	$18,858	64.0%	$18,974	63.8%	0.6%

Note: Percentages may not add to 100 due to rounding.

Oakland

	1983	1984	1985	1986	1987	1988
	Thousands					
Operating Revenues (OR)	$47,583	$50,591	$61,117	$67,219	$67,767	$71,074
Operating Expenses (OE)	19,915	22,878	24,333	28,651	31,738	35,695
NET OPERATING INCOME (NOI)	27,668	27,713	36,784	38,568	36,029	35,379
Non-Operating Revenues	5,455	3,270	5,576	4,817	7,386	5,089
Non-Operating Expenses	11,736	10,046	9,442	10,504	12,469	14,752
NET OPERATING INCOME "A" (NI"A")	21,387	20,937	32,918	32,881	30,946	25,716
Depreciation	7,943	9,047	9,575	11,412	12,066	13,537
NET OPERATING INCOME "B" (NI"B")	13,444	11,890	23,343	21,469	18,880	12,179
Tax Revenues	0	0	0	0	0	0
NET OPERATING INCOME "C" (NI"C")	13,444	11,890	23,343	21,469	18,880	12,179
Net Capital Assets (NCA)	275,003	301,905	354,706	362,001	383,980	410,354
Total Assets (TA)	372,874	398,340	478,156	497,687	513,819	601,776
OPERATING ACTIVITY INDICATORS						
Operating ROI (NOI/NCA)	10.06%	9.18%	10.37%	10.65%	9.38%	8.62%
Operating Margin (NOI/OR)	58.15	54.78	60.19	57.38	53.17	49.78
Operating Ratio (OE/OR)	41.85	45.22	39.81	42.62	46.83	50.22
OTHER ROI INDICATORS						
ROI "A" (NI"A"/TA)	5.74	5.26	6.88	6.61	6.02	4.27
ROI "B" (NI"B"/TA)	3.61	2.98	4.88	4.31	3.67	2.02
ROI "C" (NI"C"/TA)	3.61	2.98	4.88	4.31	3.67	2.02

Operating Revenues By Source - Oakland
Dollars in Thousands

Category	1987	% Total	1988	% Total	% Change 1988/87
South Airport	$22,944	33.9%	$25,169	35.4%	9.7%
North Airport	4,735	7.0	4,985	7.0	5.3
Total Airport	27,679	40.8	30,154	42.4	8.9
Marine Terminals	33,994	50.2	34,910	49.1	2.7
Properties	6,093	9.0	6,009	8.5	-1.4
Total	$67,766	100.0%	$71,073	100.0%	4.9%
Maritime	$33,994	50.2%	$34,910	49.1%	2.7%

Properties by Type
Dollars in Thousands

Category	Actual 1987/88	% Total	Anticipated 1988/89	% Total	% Change 1988/87
Airport Business Park	$1,813	30.6%	$1,859	26.4%	2.5%
Other Areas	1,791	30.2	1,860	26.5	3.9
Jack London Square	1,439	24.3	1,670	23.8	16.1
Embarcadero Cove	847	14.3	817	11.6	-3.5
Embarcadero Marina	425	7.2	760	10.8	78.8
Distribution Center	172	2.9	189	2.7	9.9
J. L. Square Parking	-557	-9.4	-125	-1.8	-77.6
Total	$5,930	100.0%	$7,030	100.0%	18.5%

Sacramento

	1983	1984	1985	1986	1987	1988
	Thousands					
Operating Revenues (OR)	$ 9,996	$ 9,804	$ 8,543	$ 7,895	$ 8,241	$ 9,101
Operating Expenses (OE)	8,504	8,230	7,963	7,179	7,211	7,220
NET OPERATING INCOME (NOI)	1,492	1,574	580	716	1,030	1,881
Non-Operating Revenues	2,850	1,174	1,256	935	562	584
Non-Operating Expenses	625	1,088	1,691	1,778	1,692	1,586
NET OPERATING INCOME "A" (NI"A")	3,717	1,660	145	-127	-100	879
Depreciation	938	1,272	1,375	1,422	1,443	1,482
NET OPERATING INCOME "B" (NI"B")	2,779	388	-1,230	-1,549	-1,543	-603
Tax Revenues	589	602	572	528	573	631
NET OPERATING INCOME "C" (NI"C")	3,368	990	-658	-1,021	-970	28
Net Capital Assets (NCA)	36,472	35,738	40,444	39,641	38,723	37,593
Total Assets (TA)	54,850	55,035	53,452	51,026	48,365	46,635
OPERATING ACTIVITY INDICATORS						
Operating ROI (NOI/NCA)	4.09%	4.40%	1.43%	1.81%	2.66%	5.00%
Operating Margin (NOI/OR)	14.93	16.05	6.79	9.07	12.50	20.67
Operating Ratio (OE/OR)	85.07	83.95	93.21	90.93	87.50	79.33
OTHER ROI INDICATORS						
ROI "A" (NI"A"/TA)	6.78	3.02	0.27	-0.25	-0.21	1.88
ROI "B" (NI"B"/TA)	5.07	0.71	-2.30	-3.04	-3.19	-1.29
ROI "C" (NI"C"/TA)	6.14	1.80	-1.23	-2.00	-2.01	0.06

Los Angeles

	1983	1984	1985	1986	1987	1988
	Thousands					
Operating Revenues (OR)	$ 69,786	$ 80,592	$ 92,816	$115,470	$127,621	$146,256
Operating Expenses (OE)	39,717	35,703	37,742	47,516	52,168	51,280
NET OPERATING INCOME (NOI)	30,069	44,889	55,074	67,954	75,453	94,976
Non-Operating Revenues	11,485	8,335	7,039	5,428	8,818	9,263
Non-Operating Expenses	1,129	616	174	1,726	1,406	2,915
NET OPERATING INCOME "A" (NI"A")	40,425	52,608	61,939	71,656	82,865	101,324
Depreciation	9,243	10,911	13,192	13,673	15,691	17,268
NET OPERATING INCOME "B" (NI"B")	31,182	41,697	48,747	57,983	67,174	84,056
Tax Revenues	0	0	0	0	0	0
NET OPERATING INCOME "C" (NI"C")	31,182	41,697	48,747	57,983	67,174	84,056
Net Capital Assets (NCA)	306,841	367,607	398,792	441,423	518,406	547,695
Total Assets (TA)	450,008	492,675	691,804	792,995	850,148	938,350
OPERATING ACTIVITY INDICATORS						
Operating ROI (NOI/NCA)	9.80%	12.21%	13.81%	15.39%	14.55%	17.34%
Operating Margin (NOI/OR)	43.09	55.70	59.34	58.85	59.12	64.94
Operating Ratio (OE/OR)	56.91	44.30	40.66	41.15	40.88	35.06
OTHER ROI INDICATORS						
ROI "A" (NI"A"/TA)	8.98	10.68	8.95	9.04	9.75	10.80
ROI "B" (NI"B"/TA)	6.93	8.46	7.05	7.31	7.90	8.96
ROI "C" (NI"C"/TA)	6.93	8.46	7.05	7.31	7.90	8.96

Operating Revenues By Source - Los Angeles
Dollars in Thousands

Category	1987	% Total	1988	% Total	% Change 1988/87
Dockage	7,717	6.7	7,500	5.9	-2.8
Wharfage	60,378	52.3	63,630	49.9	5.4
Storage	367	0.3	378	0.3	3.0
Demurrage	3,091	2.7	3,565	2.8	15.3
Pilotage	3,138	2.7	3,104	2.4	-1.1
Assignment Charges	1,282	1.1	1,712	1.3	33.5
Cranes	7,933	6.9	6,806	5.3	-14.2
Land	23,174	20.1	27,873	21.8	20.3
Buildings	1,163	1.0	1,411	1.1	21.3
Warehouses	2,375	2.1	2,739	2.1	15.3
Wharf and Shed Revenues	577	0.5	514	0.4	-10.9
Cabrillo Beach Rec. Complex	342	0.3	3,010	2.4	780.1
Fees, Commissions	870	0.8	1,276	1.0	46.7
Oil Royalties	1,233	1.1	1,199	0.9	-2.8
Other	1,830	1.6	2,904	2.3	58.7
Total	$115,470	100.0%	$127,621	100.0%	10.5%

Note: Percentages may not add to 100 due to rounding.

Long Beach

	1983	1984	1985	1986	1987	1988
	Thousands					
Operating Revenues (OR)	$ 53,391	$ 61,888	$ 63,751	$ 73,576	$ 87,802	$ 89,867
Operating Expenses (OE)	23,118	24,784	24,037	24,278	22,537	25,168
NET OPERATING INCOME (NOI)	30,273	37,104	39,714	49,298	65,265	64,699
Non-Operating Revenues	10,232	9,546	12,057	13,522	9,485	13,460
Non-Operating Expenses	4,590	12,768	8,626	10,172	13,489	12,349
NET OPERATING INCOME "A" (NI"A")	35,915	33,882	43,145	52,648	61,261	65,810
Depreciation	10,391	12,831	11,802	12,443	16,993	18,501
NET OPERATING INCOME "B" (NI"B")	25,524	21,051	31,343	40,205	44,268	47,309
Tax Revenues	0	0	0	0	0	0
NET OPERATING INCOME "C" (NI"C")	25,524	21,051	31,343	40,205	44,268	47,309
Net Capital Assets (NCA)	277,812	302,372	351,352	347,297	399,203	403,222
Total Assets (TA)	496,447	512,096	540,704	579,263	634,510	680,342
OPERATING ACTIVITY INDICATORS						
Operating ROI (NOI/NCA)	10.90%	12.27%	11.30%	14.19%	16.35%	16.05%
Operating Margin (NOI/OR)	56.70	59.95	62.30	67.00	74.33	71.99
Operating Ratio (OE/OR)	43.30	40.05	37.70	33.00	25.67	28.01
OTHER ROI INDICATORS						
ROI "A" (NI"A"/TA)	7.23	6.62	7.98	9.09	9.65	9.67
ROI "B" (NI"B"/TA)	5.14	4.11	5.80	6.94	6.98	6.95
ROI "C" (NI"C"/TA)	5.14	4.11	5.80	6.94	6.98	6.95

Operating Revenues By Source - Long Beach
Dollars in Thousands

Category	1987	% Total	1988	% Total	% Change 1988/87
Berths and Special Facilities	$80,134	91.3%	$81,837	91.1%	2.1%
Rental Properties	5,477	6.2	5,748	6.4	4.9
Miscellaneous	2,191	2.5	2,282	2.5	4.2
Total	$87,802	100.0%	$89,867	100.0%	2.4%

Note: Percentages may not add to 100 due to rounding.

San Diego

	1983	1984	1985	1986	1987	1988
	Thousands					
Operating Revenues (OR)	$ 40,582	$ 46,756	$ 53,184	$ 58,499	$ 64,373	$ 68,090
Operating Expenses (OE)	19,542	19,755	23,342	25,448	26,791	30,232
NET OPERATING INCOME (NOI)	21,040	27,001	29,842	33,051	37,582	37,858
Non-Operating Revenues	9,515	10,129	13,625	13,358	13,704	15,650
Non-Operating Expenses	1,274	1,167	1,053	1,025	921	811
NET OPERATING INCOME "A" (NI"A")	29,281	35,963	42,414	45,384	50,365	52,697
Depreciation	7,469	6,423	7,335	7,674	8,751	9,040
NET OPERATING INCOME "B" (NI"B")	21,812	29,540	35,079	37,710	41,614	43,657
Tax Revenues	0	0	0	0	0	0
NET OPERATING INCOME "C" (NI"C")	21,812	29,540	35,079	37,710	41,614	43,657
Net Capital Assets (NCA)	137,114	139,853	146,621	148,140	148,650	147,555
Total Assets (TA)	233,869	262,343	299,332	335,926	376,228	425,752
OPERATING ACTIVITY INDICATORS						
Operating ROI (NOI/NCA)	15.34%	19.31%	20.35%	22.31%	25.28%	25.66%
Operating Margin (NOI/OR)	51.85	57.75	56.11	56.50	58.38	55.60
Operating Ratio (OE/OR)	48.15	42.25	43.89	43.50	41.62	44.40
OTHER ROI INDICATORS						
ROI "A" (NI"A"/TA)	12.52	13.71	14.17	13.51	13.39	12.38
ROI "B" (NI"B"/TA)	9.33	11.26	11.72	11.23	11.06	10.25
ROI "C" (NI"C"/TA)	9.33	11.26	11.72	11.23	11.06	10.25

Operating Revenues By Source - San Diego
Dollars in Thousands

Category	1987	% Total	1988	% Total	% Change 1988/87
Marine Ops	$ 6,641	10.3%	$ 6,680	9.8%	0.6%
Airport Ops	30,377	47.2	32,025	47.0	5.4
Property Ops	27,353	42.5	29,384	43.2	7.4
Total	$64,372	100.0%	$68,089	100.0%	5.8%
Maritime	$33,994	52.8%	$34,910	51.3%	2.7%

Note: Percentages may not add to 100 due to rounding.

Portland

	1983	1984	1985	1986	1987	1988
	Thousands					
Operating Revenues (OR)	$ 63,975	$ 75,694	$ 83,150	$ 82,222	$ 83,332	$ 87,685
Operating Expenses (OE)	53,992	66,852	72,853	73,258	69,755	68,311
NET OPERATING INCOME (NOI)	9,983	8,842	10,297	8,964	13,577	19,374
Net-Operating Revenues	12,740	7,282	12,504	12,970	8,328	8,302
Net-Operating Expenses	11,162	10,071	14,809	15,921	15,451	18,629
NET OPERATING INCOME "A" (NI"A")	11,561	6,053	7,992	6,013	6,454	9,047
Depreciation	12,931	13,952	15,097	15,448	16,320	19,350
NET OPERATING INCOME "B" (NI"B")	-1,370	-7,899	-7,105	-9,435	-9,866	-10,303
Tax Revenues	6,012	6,978	13,881	14,070	15,262	14,341
NET OPERATING INCOME "C" (NI"C")	4,642	-921	6,776	4,635	5,396	4,038
Net Capital Assets (NCA)	254,065	258,501	264,928	242,790	281,646	314,658
Total Assets (TA)	407,298	403,134	475,857	488,979	493,570	534,858
OPERATING ACTIVITY INDICATORS						
Operating ROI (NOI/NCA)	3.93%	3.42%	3.89%	3.69%	4.82%	6.16%
Operating Margin (NOI/OR)	15.60	11.68	12.38	10.90	16.29	22.09
Operating Ratio (OE/OR)	84.40	88.32	87.62	89.10	83.71	77.91
OTHER ROI INDICATORS						
ROI "A" (NI"A"/TA)	2.84	1.50	1.68	1.23	1.31	1.69
ROI "B" (NI"B"/TA)	-0.34	-1.96	-1.49	-1.93	-2.00	-1.93
ROI "C" (NI"C"/TA)	1.14	-0.23	1.42	0.95	1.09	0.75

Operating Revenues By Source - Portland
Dollars in Thousands

Category	1987	% Total	1988	% Total	% Change 1988/87
Marine Terminals	$35,534	42.6%	$37,513	42.8%	5.6%
Ship Repair Yard	17,025	20.4	17,370	19.8	2.0
Navigation Services	3,280	3.9	2,840	3.2	-13.4
General Aviation	957	1.1	925	1.1	-3.3
Real Estate	2,430	2.9	1,379	1.6	-43.3
Management/Administration	176	0.2	120	0.1	-31.8
Portland Int'l Airport	23,930	28.7	27,538	31.4	15.1
Total	$83,332	100.0%	$87,685	100.0%	5.2%
Maritime	$38,814	46.6%	$40,353	46.0%	4.0%

Note: Percentages may not add to 100 due to rounding.

Tacoma

	1983	1984	1985	1986	1987	1988
	Thousands					
Operating Revenues (OR)	$ 27,966	$ 28,567	$ 34,152	$ 39,850	$ 39,399	$ 47,836
Operating Expenses (OE)	16,037	16,849	20,755	24,883	24,867	29,223
NET OPERATING INCOME (NOI)	11,929	11,718	13,397	14,967	14,532	18,613
Net-Operating Revenues	5,243	6,092	3,531	3,335	3,594	4,506
Net-Operating Expenses	3,666	3,720	3,556	5,851	4,844	5,084
NET OPERATING INCOME "A" (NI"A")	13,506	14,090	13,372	12,451	13,282	18,035
Depreciation	4,373	4,638	6,271	7,107	7,598	7,565
NET OPERATING INCOME "B" (NI"B")	9,133	9,452	7,101	5,344	5,684	10,470
Tax Revenues	2,343	2,086	2,671	2,699	3,244	3,853
NET OPERATING INCOME "C" (NI"C")	11,476	11,538	9,772	8,043	8,928	14,323
Net Capital Assets (NCA)	126,789	138,706	182,225	192,630	191,687	197,050
Total Assets (TA)	214,126	226,229	240,500	247,963	261,641	293,251
OPERATING ACTIVITY INDICATORS						
Operating ROI (NOI/NCA)	9.41%	8.45%	7.35%	7.77%	7.58%	9.45%
Operating Margin (NOI/OR)	42.66	41.02	39.23	37.56	36.88	38.91
Operating Ratio (OE/OR)	57.34	58.98	60.77	62.44	63.12	61.09
OTHER ROI INDICATORS						
ROI "A" (NI"A"/TA)	6.31	6.23	5.56	5.02	5.08	6.15
ROI "B" (NI"B"/TA)	4.27	4.18	2.95	2.16	2.17	3.57
ROI "C" (NI"C"/TA)	5.36	5.10	4.06	3.24	3.41	4.88

Operating Revenues By Source - Tacoma
Dollars in Thousands

Category	1987	% Total	1988	% Total	% Change 1988/87
Terminal Services	$22,274	56.5%	$27,484	57.5%	23.4%
Property Rentals	17,125	43.5	20,351	42.5	18.8
Total	$39,399	100.0%	$47,835	100.0%	21.4%

Note: Percentages may not add to 100 due to rounding.

Seattle

	1983	1984	1985	1986	1987	1988
	Thousands					
Operating Revenues (OR)	$ 84,940	$ 92,430	$ 98,344	$101,663	$109,095	$114,483
Operating Expenses (OE)	51,725	58,079	65,424	69,747	69,598	$76,177
NET OPERATING INCOME (NOI)	33,215	34,351	32,920	31,916	39,497	$38,306
Non-Operating Revenues	9,879	12,969	10,911	17,782	8,827	$7,875
Non-Operating Expenses	15,324	16,444	16,658	17,859	17,568	$17,815
NET OPERATING INCOME "A" (NI"A")	27,770	30,876	27,173	31,839	30,756	$28,366
Depreciation	17,596	17,838	20,698	22,369	26,027	$26,790
NET OPERATING INCOME "B" (NI"B")	10,174	13,038	6,475	9,470	4,729	$1,576
Tax Revenues	16,947	18,397	19,456	21,159	22,855	$24,885
NET OPERATING INCOME "C" (NI"C")	27,121	31,435	25,931	30,629	27,584	$26,461
Net Capital Assets (NCA)	507,909	565,150	593,584	656,459	695,548	$722,444
Total Assets (TA)	703,744	734,979	831,121	855,447	881,686	$901,288
OPERATING ACTIVITY INDICATORS						
Operating ROI (NOI/NCA)	6.54%	6.08%	5.55%	4.86%	5.68%	5.30%
Operating Margin (NOI/OR)	39.10	37.16	33.47	31.39	36.20	33.46%
Operating Ratio (OE/OR)	60.90	62.84	66.53	68.61	63.80	66.54%
OTHER ROI INDICATORS						
ROI "A" (NI"A"/TA)	3.95	4.20	3.27	3.72	3.49	3.15%
ROI "B" (NI"B"/TA)	1.45	1.77	0.78	1.11	0.54	0.17%
ROI "C" (NI"C"/TA)	3.85	4.28	3.12	3.58	3.13	2.94%

Operating Revenues By Source - Seattle
Dollars in Thousands

Category	1987	% Total	1988	% Total	% Change 1988/87
Marine Terminals	$ 45,598	41.8%	$ 46,797	40.9%	2.6%
Airport	63,497	58.2	67,685	59.1	6.6
Total	$109,095	100.0%	$114,482	100.0%	4.9%

Marine Revenues By Source

Category	1988	% Total	1989 est	% Total	% Change 1989/88
Marine Operations	$ 4,316	9.2%	$ 4,138	8.3%	-4.1%
Marine Real Estate	32,268	69.0	35,039	70.4	8.6
Transportation Services	10,213	21.8	10,564	21.2	3.4
Total	$46,797	100.0%	$49,741	100.0%	6.3%

Note: Percentages may not add to 100 due to rounding.

Operating Revenues (000s)

	1983	1984	1985	1986	1987	1988
Los Angeles	$69,786	$80,592	$92,816	$115,470	$127,621	$146,256
Seattle	84,941	92,430	98,344	101,663	109,095	114,483
Long Beach	46,083	53,391	61,888	63,751	73,576	87,802
Portland	63,975	75,694	83,150	82,222	83,332	87,685
Oakland	47,583	50,591	61,117	67,219	67,767	71,074
San Diego	40,582	46,756	53,184	58,499	64,373	68,090
Tacoma	27,966	28,567	34,152	39,850	39,399	47,836
San Francisco	26,360	27,621	29,121	29,411	29,457	29,745

Percent Change	1984/3	1985/4	1986/5	1987/6	1988/7	Average 1988/3
Los Angeles	15.5%	15.2%	24.4%	10.5%	14.6%	15.9%
Seattle	8.8	6.4	3.4	7.3	4.9	6.2
Long Beach	15.9	15.9	3.0	15.4	19.3	13.8
Portland	18.3	9.9	-1.1	1.4	5.2	6.5
Oakland	6.3	20.8	10.0	0.8	4.9	8.4
San Diego	15.2	13.7	10.0	10.0	5.8	10.9
Tacoma	2.1	19.6	16.7	-1.1	21.4	11.3
San Francisco	4.8	5.4	1.0	0.2	1.0	2.4

Source: Ports Financial Reports

Operating Expenses (000s)

	1983	1984	1985	1986	1987	1988
Los Angeles	$39,717	$35,703	$37,742	$47,516	$52,168	$51,280
Seattle	51,725	58,079	65,424	69,747	69,598	76,177
Long Beach	19,927	23,118	24,784	24,037	24,278	22,537
Portland	53,992	66,852	72,853	73,258	69,755	68,311
Oakland	19,915	22,878	24,333	28,651	31,738	35,695
San Diego	19,542	19,755	23,342	25,448	26,791	30,232
Tacoma	16,037	16,849	20,755	24,883	24,867	29,223
San Francisco	16,842	15,248	19,829	21,033	23,155	21,762

Percent Change	1984/3	1985/4	1986/5	1987/6	1988/7	Average 1988/3
Los Angeles	-10.1%	5.7%	25.9%	9.8%	-1.7%	5.2%
Seattle	12.3	12.6	6.6	-0.2	9.5	8.0
Long Beach	16.0	7.2	-3.0	1.0	-7.2	2.5
Portland	23.8	9.0	0.6	-4.8	-2.1	4.8
Oakland	14.9	6.4	17.7	10.8	12.5	12.4
San Diego	1.1	18.2	9.0	5.3	12.8	9.1
Tacoma	5.1	23.2	19.9	-0.1	17.5	12.8
San Francisco	-9.5	30.0	6.1	10.1	-6.0	5.3

Source: Ports Financial Reports

Net Operating Income (000s)

	1983	1984	1985	1986	1987	1988
Los Angeles	$30,069	$44,889	$55,074	$67,954	$75,453	$94,976
Seattle	33,215	34,351	32,920	31,916	39,497	38,306
Long Beach	26,156	30,273	37,104	39,714	49,298	65,265
Portland	9,983	8,842	10,297	8,964	13,577	19,374
Oakland	27,668	27,713	36,784	38,568	36,029	35,379
San Diego	21,040	27,001	29,842	33,051	37,582	37,858
Tacoma	11,929	11,718	13,397	14,967	14,532	18,613
San Francisco	9,518	12,373	9,292	8,378	6,302	7,983

Percent Change	1984/3	1985/4	1986/5	1987/6	1988/7	Average 1988/3
Los Angeles	49.3%	22.7%	23.4%	11.0%	25.9%	25.9%
Seattle	3.4	-4.2	-3.0	23.8	-3.0	2.9
Long Beach	15.7	22.6	7.0	24.1	32.4	20.1
Portland	-11.4	16.5	-12.9	51.5	42.7	14.2
Oakland	0.2	32.7	4.8	-6.6	-1.8	5.0
San Diego	28.3	10.5	10.8	13.7	0.7	12.5
Tacoma	-1.8	14.3	11.7	-2.9	28.1	9.3
San Francisco	30.0	-24.9	-9.8	-24.8	26.7	-3.5

Source: Ports Financial Reports

Operating Return on Investment

	1983	1984	1985	1986	1987	1988
Los Angeles	9.8%	12.21%	13.81%	15.39%	14.55%	17.34%
Seattle	6.54	6.08	5.55	4.86	5.68	5.30
Long Beach	11.88	10.90	12.27	11.30	14.19	16.35
Portland	3.93	3.42	3.89	3.69	4.82	6.16
Oakland	10.06	9.18	10.37	10.65	9.38	8.62
San Diego	15.34	19.31	20.35	22.31	25.28	25.66
Tacoma	9.41	8.45	7.35	7.77	7.58	9.45
San Francisco	5.75	7.36	5.49	5.01	3.77	4.60

COMPARISON OF WEST COAST STEAMSHIP LINES ON MAJOR TRADE ROUTES

COMPARISON OF WEST COAST STEAMSHIP LINES ON MAJOR TRADE ROUTES

Exports By Carrier From Pacific Coast To Northern Europe

	1987				1988				1989	
	Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2	
Line	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share
CMB (BELG)	5,796	2.0%	8,390	2.4%	7,305	2.2%	4,793	1.2%	4,089	1.0%
EVERGREEN	1,955	0.7	2,746	0.8	1,892	0.6	5,901	1.5	6,218	1.6
HAPAG LD	46,782	16.4	56,856	16.5	55,341	16.4	71,188	17.8	84,596	21.2
JOHN SCAN	86,229	-	90,918	30.2	84,448	26.4	66,302	25.1	54,786	16.6
MAERSK	0	0.0	0	0.0	7,257	2.2	71,415	17.9	79,394	19.9
PAC EUR EXP	32,241	11.3	40,421	11.7	33,230	9.9	44,148	11.1	45,125	11.3
SEALAND	0	0.0	0	0.0	0	0.0	3,873	1.0	12,764	3.2
SENATOR	1,859	0.7	19,151	5.6	30,265	9.0	32,674	8.2	26,128	6.6
STAR	20,306	7.1	26,090	7.6	24,350	7.2	24,031	6.0	17,511	4.4
TRANS	0	0.0	0	0.0	0	0.0	3,877	1.0	8,640	2.2
WESTWOOD	90,233	31.6	100,150	29.1	92,510	27.5	71,255	17.8	58,891	14.8
TOTAL	285,401	100.0%	344,722	100.0%	336,598	100.0%	399,457	100.0%	398,142	100.0%

Note: Percentages may not add to 100 due to rounding.

COMPARISON OF WEST COAST STEAMSHIP LINES ON MAJOR TRADE ROUTES

Exports By Carrier From Pacific Coast To Mediterranean

	1987				1988				1989	
	Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2	
Line	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share
D'AMICO	12,468	29.5%	16,383	19.4%	44,910	40.5%	15,319	20.2%	33,579	49.0%
ITALIAN	10,040	23.8	26,742	31.6	18,885	17.0	20,551	27.1	9,714	14.2
UNITED YUG	5,724	13.5	9,629	11.4	11,570	10.4	5,721	7.5	4,350	6.3
ZIM CONT	14,012	33.2	31,830	37.6	35,543	32.0	34,204	45.1	20,871	30.5
TOTAL	42,244	100.0%	84,584	100.0%	110,908	100.0%	75,795	100.0%	68,514	100.0%

Note: Percentages may not add to 100 due to rounding.

COMPARISON OF WEST COAST STEAMSHIP LINES ON MAJOR TRADE ROUTES

Exports By Carrier From Pacific Coast To Far East

	1987				1988				1989	
	Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2	
Line	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share
AMER PRES	691,213	11.5%	881,081	12.5%	882,903	11.8%	924,838	12.4%	1,047,522	12.9%
COSCO	43,863	0.7	48,258	0.7	107,581	1.4	245,079	3.3	262,214	3.2
EAC LINE	108,259	1.8	107,980	1.5	95,614	1.3	92,418	1.2	86,182	1.1
EVERGREEN	447,602	7.4	487,895	6.9	658,132	8.8	734,367	9.8	907,619	11.2
GEARBULK	105,644	1.8	124,592	1.8	119,275	1.6	115,785	1.5	115,307	1.4
HANJIN	442,460	7.3	578,386	8.2	509,294	6.8	540,169	7.2	526,451	6.5
HONG KONG	88,905	1.5	95,257	1.3	133,252	1.8	87,070	1.2	36,483	0.5
HYUNDAI	433,034	7.2	490,613	6.9	486,232	6.5	557,368	7.5	567,434	7.0
K LINE	416,850	6.9	521,528	7.4	565,768	7.5	594,965	8.0	653,074	8.1
MAERSK	371,877	6.2	531,199	7.5	477,843	6.4	481,926	6.4	505,650	6.2
MEXICAN	42,926	0.7	35,364	0.5	41,254	0.5	63,758	0.9	79,615	1.0
NEPTUNE	156,159	2.6	200,849	2.8	223,941	3.0	216,914	2.9	240,534	3.0
NIPPON LS	480,485	8.0	577,216	8.2	566,520	7.5	419,029	5.6	378,666	4.7
NSCP	25,899	0.4	36,341	0.5	44,966	0.6	44,739	0.6	42,119	0.5
NYK LINE	411,622	6.8	501,159	7.1	553,256	7.4	571,510	7.6	645,772	8.0
OOSS	325,779	5.4	294,576	4.2	282,614	3.8	291,274	3.9	309,634	3.8
MITSUI OSK	358,884	6.0	399,586	5.7	480,415	6.4	537,352	7.2	631,101	7.8
SEALAND	669,479	11.1	662,630	9.4	770,622	10.3	670,178	9.0	774,167	9.6
SHOWA	246,489	4.1	283,101	4.0	250,892	3.3	17,970	0.2	0	0.0
SENATOR	0	0.0	36,687	0.5	41,152	0.5	37,238	0.5	41,107	0.5
STAR	66,296	1.1	69,208	1.0	77,525	1.0	61,474	0.8	46,680	0.6
WESTWOOD	49,846	0.8	36,759	0.5	55,464	0.7	71,820	1.0	82,022	1.0
YANGMING	22,449	0.4	32,986	0.5	29,951	0.4	34,735	0.5	72,359	0.9
ZIM CONT	23,174	0.4	34,463	0.5	54,196	0.7	62,629	0.8	52,833	0.7
TOTAL	6,029,194	100.0%	7,067,714	100.0%	7,508,662	100.0%	7,474,605	100.0%	8,104,545	100.0%

Note: Percentages may not add to 100 due to rounding.

COMPARISON OF WEST COAST STEAMSHIP LINES ON MAJOR TRADE ROUTES

Imports By Carrier To Pacific Coast From Northern Europe

	1987				1988				1989	
	Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2	
Line	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share
CMB (BELG)	11,094	2.4%	17,233	3.4%	11,740	2.4%	7,346	1.4%	4,895	0.9%
EVERGREEN	0	0.0	0	0.0	2,205	0.5	27,557	5.3	38,247	7.2
GEARBULK	73,244	15.9	76,825	15.0	55,293	11.4	0	0.0	0	0.0
HAPAG LD	55,722	12.1	56,311	11.0	58,217	12.0	72,710	14.1	85,896	16.1
JOHN SCAN	80,578	17.5	92,112	17.9	82,279	17.0	58,623	11.3	55,167	10.3
MAERSK	0	0.0	0	0.0	10,199	2.1	85,250	16.5	87,345	16.4
PAC EUR EXP	38,003	8.2	42,734	8.3	44,177	9.1	58,834	11.4	59,865	11.2
SEALAND	0	0.0	0	0.0	0	0.0	1,533	0.3	16,698	3.1
SENATOR	0	0.0	18,314	3.6	24,810	5.1	22,408	4.3	20,340	3.8
STAR	71,256	15.4	65,220	12.7	55,251	11.4	52,822	10.2	36,881	6.9
TRANS	0	0.0	0	0.0	0	0.0	2,294	0.4	14,989	2.8
WESTWOOD	131,575	28.5	144,911	28.2	140,932	29.1	127,712	24.7	113,423	21.3
TOTAL	461,472	100.0%	513,660	100.0%	485,103	100.0%	517,089	100.0%	533,746	100.0%

Note: Percentages may not add to 100 due to rounding.

COMPARISON OF WEST COAST STEAMSHIP LINES ON MAJOR TRADE ROUTES

Imports By Carrier To Pacific Coast From Mediterranean

	1987				1988				1989	
	Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2	
Line	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share
D'AMICO	38,190	27.2%	49,843	33.2%	34,228	24.8%	38,261	24.8%	30,886	23.1%
ITALIAN	29,392	21.0	32,212	21.4	26,605	19.3	30,949	20.1	27,492	20.5
UNITED YUG	27,926	19.9	24,503	16.3	26,707	19.4	33,429	21.7	24,205	18.1
ZIM CONT	44,761	31.9	43,642	29.1	50,382	36.5	51,612	33.5	51,227	38.3
TOTAL	140,269	100.0%	150,200	100.0%	137,922	100.0%	154,251	100.0%	133,810	100.0%

Note: Percentages may not add to 100 due to rounding.

COMPARISON OF WEST COAST STEAMSHIP LINES ON MAJOR TRADE ROUTES

Imports By Carrier To Pacific Coast From Far East

	1987				1988				1989	
	Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2		Quarters 3 & 4		Quarters 1 & 2	
Line	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share	Metric Tons	Percent Market Share
AMER PRES	828,558	13.4%	897,607	13.8%	879,504	14.1%	1,083,663	15.6%	1,018,638	15.2%
COSCO	132,291	2.1	126,966	2.0	144,171	2.3	163,769	2.4	221,698	3.3
EAC LINE	90,506	1.5	87,133	1.3	70,986	1.1	64,911	0.9	61,258	0.9
EVERGREEN	512,333	8.3	542,607	8.4	535,667	8.6	621,636	9.0	685,766	10.2
GEARBULK	113,359	1.8	112,115	1.7	89,174	1.4	74,304	1.1	88,567	1.3
HANJIN	472,241	7.6	481,072	7.4	410,614	6.6	445,428	6.4	487,110	7.3
HONG KONG	187,830	3.0	198,595	3.1	179,623	2.9	158,509	2.3	53,291	0.8
HYUNDAI	336,663	5.4	381,961	5.9	326,463	5.2	388,477	5.6	395,968	5.9
K LINE	448,873	7.2	491,827	7.6	429,320	6.9	626,958	9.0	561,301	8.4
MAERSK	358,693	5.8	401,462	6.2	397,303	6.4	487,041	7.0	478,723	7.1
MEXICAN	69,486	1.1	64,091	1.0	62,413	1.0	54,124	0.8	60,540	0.9
NEPTUNE	204,586	3.3	207,255	3.2	172,692	2.8	184,098	2.7	147,402	2.2
NIPPON LS	386,180	6.2	400,863	6.2	363,246	5.8	302,652	4.4	243,989	3.6
NSCP	54,027	0.9	56,171	0.9	51,040	0.8	45,228	0.7	50,415	0.8
NYK LINE	316,558	5.1	347,322	5.4	398,449	6.4	466,993	6.7	489,669	7.3
OOSS	313,436	5.1	297,515	4.6	292,708	4.7	300,480	4.3	279,210	4.2
MITSUI OSK	250,759	4.0	263,242	4.1	293,077	4.7	389,764	5.6	375,054	5.6
SEALAND	572,286	9.2	584,508	9.0	665,789	10.7	765,034	11.0	698,985	10.4
SHOWA	157,743	2.5	199,552	3.1	143,694	2.3	3,490	0.1	0	0.0
SENATOR	4,566	0.1	39,721	0.6	43,182	0.7	44,599	0.6	61,021	0.9
STAR	70,114	1.1	83,114	1.3	68,390	1.1	67,110	1.0	40,110	0.6
USLI	90,232	1.5	0	0.0	0	0.0	0	0.0	0	0.0
WESTWOOD	145,427	2.3	140,732	2.2	127,085	2.0	91,900	1.3	86,094	1.3
YANGMING	65,984	1.1	62,182	1.0	59,098	0.9	67,739	1.0	99,364	1.5
ZIM CONT	19,635	0.3	18,784	0.3	28,828	0.5	41,205	0.6	34,390	0.5
TOTAL	6,202,366	100%	6,486,397	100%	6,232,516	100%	6,939,112	100%	6,718,563	100%

Note: Percentages may not add to 100 due to rounding.

WEST COAST CONTAINER SERVICE

BY PORT

WEST COAST CONTAINER SERVICE

Long Beach

Line	Terminal	Frequency	Agency	Consortia
Canadian Tropic	J245-247	Semimonthly	Southern Steam	
CGM	J232-234	Weekly	Kerr	w.HapLyd,Inco.
COSCO	J245-247	Semimonthly	Norton Lilly	
EAC	C20	Semimonthly	EAC	
Ecuadorian	J232-234	Monthly	Salen	
Hapag Lloyd	J232-234	Weekly	Hapag Lloyd	w.CGM,Inco.
Hoegh	C26	Monthly	Hoegh	
Hyundai	C20	Weekly	Hyundai	
Incotrans	J232-234	Weekly	Matson	w.CGM,HapLyd.
Italia/d'Amico	J245-247	Semimonthly	W.Dimond	
Kline	J232-234	Weekly	Kerr	
Maersk	J232-234	Weekly	Maersk	
Mexican	J232-234	Weekly	TransAm Steam	
NatShiCorPhil	J232-234	Semimonthly	InterPacif	
Navicana	228	Monthly	Matson	
NavieraPacific		Monthly	Norsk Pacific	
Neptune Orient	A6-8	Weekly	TRICOM	w.OOCL,NL
Nippon Liner	A6-8	Semiweekly	Pacific Liner	w.OOCL,NOL
OOCL	A6-8	Weekly	OOCL	w.NL,NOL
Polynesia	C20	Monthly	Interocean	
Sea Land	G230	Weekly	Sea Land	
Senator	G226-229	Semimonthly	Southern Steam	
South Seas	A6-8	Monthly	United Steam	
Splosna Plovba	J245-247	Monthly	Matson	
Zim	J232-4,A6-8	Weekly	Zim	

WEST COAST CONTAINER SERVICE

Los Angeles

Line	Terminal	Frequency	Agency	Consortia
ACT PACE	TRAPAC	Weekly	ACT	
AGMARESA(Dole)	Is. 136	Weekly	W. Dimond	
ASEAN Carriers	220	Monthly	First Ocean	
AmericaNiugini	Wilm. 154	Two months	First Ocean	
APL	APL (B121-6)	Weekly	APL	
ANZD	B126	Semimonthly	ANZD	
BarberBluSea	Is. 230	Semimonthly	BarberWilh	
Blue Star	Is. 228	Semimonthly	Blue Star	
CIAMAR	B146	Monthly	Norton Lilly	
Columbus	TRAPAC	Weekly	Columbus	
EAC	Is. 233	Semimonthly	EAC	
ELMA	Indies	Semimonthly	W. Dimond	
Evergreen	Evergreen	Weekly	Evergreen	
Grancolombiana	Indies	Semimonthly	Matson	
Hanjin	Hanjin	Weekly	Hanjin	
Matson	Matson	Weekly	Matson	
Mitsui OSK	TRAPAC	Weekly	W. Dimond	
NORSUL	-	Monthly	Interocean	
NYK	Matson	Weekly	Matson	
PM&O	APL (B121-6)	Monthly	PM&O	
ShippinCoIndia	Indies	-	Norton Lilly	
Star Shipping	Indies	Semimonthly	Star Shipping	
Wallenius	Wilm. 200A	Weekly	F. Noonan	
Yang Ming	Indies	Weekly	Solar	

WEST COAST CONTAINER SERVICE

Oakland

Line	Terminal	Frequency	Agency	Consortia
AmerNiuGini	-	Two months	First Ocean	
APL	APL	Weekly	APL	
ANZD	APL	Semimonthly	ANZD	
CGM	Howard	Weekly	Kerr	w.HapLyd,Inco.
CMB	Howard	Monthly	CanadaMarit	
EAC	Howard	Weekly	EAC	
Hanjin	Seventh St	Weekly	Hanjin	
Hapag Lloyd	Howard	Weekly	Hapag lloyd	w.CGM,Inco.
Hoegh	Howard	Monthly	Hoegh	
Hyundai	Howard	Weekly	Hyundai	
Incotrans	Howard	Weekly	Matson	w.CGM,HapLyd
Italia/d'Amico	Seventh St	Semimonthly	W. Dimond	
KLine	TransBay	Weekly	Kerr	
Maersk	Maersk	Weekly	Maersk	
Matson	Matson	Weekly	Matson	
Mitsui OSK	Seventh St	Weekly	W. Dimond	
NavieraPacif	Howard	Monthly	NorskPacif	
Neptune Orient	OuterHarb	Weekly	TRICOM	w.OOCL,NL
Nippon Liner	OuterHarb	Weekly	Pacific Liner	w.OOCL,NOL
NYK	Matson	Weekly	Matson	
OOCL	OuterHarb	Weekly	OOCL	w.NL,NOL
Pearcy	Various	Monthly	Pearcy	
PM&O	APL	Monthly	PM&O	
Polynesia	Matson	Monthly	Interocean	
Sea Land	Sea Land	Weekly	Sea Land	
Senator	TransBay	Semimonthly	Southern Steam	
Star Shipping	Seventh St	Semimonthly	Star Shipping	

WEST COAST CONTAINER SERVICE

Portland

Line	Terminal	Frequency	Agency	Consortia
ANZD/IMTL	In progress	Monthly	ANZD	
Blue Star	4	Semimonthly	Blue Star	
CGM	6	Weekly	Kerr	w.HapLyd,Inco.
Evergreen	6	Weekly	Evergreen	
Hoegh	In progress	In progress	Hoegh	
Hyundai	6	Weekly	Sunrise	w.Kline
Incotrans	6	Weekly	Matson	w.CGM,HapLyd.
Italia/d'Amico	2	Semimonthly	W. Dimond	
Kline	6	Weekly	Kerr	w.Hyundai
Mitsui OSK	6	Weekly	W. Dimond	
NYK	6	Weekly	Matson	
Splosna Plovba	Various	Inducement	Matson	
Wallenius	6	Monthly	F. Noonan	

WEST COAST CONTAINER SERVICE

Richmond

Line	Terminal	Frequency	Agency	Consortia
Pearcy	Various	Monthly	Pearcy	

WEST COAST CONTAINER SERVICE

San Diego

Line	Terminal	Frequency	Agency	Consortia
South Seas	SSA	Monthly	United Steam	

WEST COAST CONTAINER SERVICE

San Francisco

Line	Pier	Frequency	Agency	Consortia
ACT/PACE	80	Weekly	ACT(USA)	
Blue Star	80	Weekly	Blue Star	
Canadian Tropic	80	Monthly	Southern Steam	
CIAMAR	80	Monthly	North Lilly	
Columbus	96	Weekly	Columbus	
COSCO	96	Weekly	Norton Lilly	
ELMA	80	Semimonthly	W.Dimond	
Evergreen	96	Weekly	Evergreen	
Grancolombiana	96	Semimonthly	Matson	
Mexican Line	96	Weekly	Trans-American	
NatShiCoPhilip	80	Semimonthly	Norton Lilly	
Navicana	80	Monthly	Matson	
Nedlloyd	80	Semimonthly	Nedlloyd	
NORSUL	80	Monthly	Interocean	
Wallenius	70	Weekly	F. Noonan	
Yugoslav	96	Monthly	Greer Shipping	
Zim	96	Weekly	Zim	

WEST COAST CONTAINER SERVICE

Seattle

Line	Terminal	Frequency	Agency	Consortia
APL	5	Weekly	APL	
CGM	42	Weekly	Kerr	w.HapLyd,Inco.
COSCO	18	Weekly	Norton Lilly	
EAC Lines	42	Weekly	EAC Lines	
Evergreen	18	Weekly	Evergreen	
Gearbulk	18	Weekly	Multi-Trans	
Grancolombiana	42	Semimonthly	Matson	
Hanjin	46	Weekly	Hanjin	
Hapag-Lloyd	42	Weekly	Hapag-Lloyd	w.CGM,Inco.
Hyundai	42	Weekly	Sunrise	
Incotrans	42	Weekly	Matson	w.CGM,HapLyd.
Italia/d'Amico	18	Semimonthly	W. Dimond	
Matson	25	Weekly	Matson	
Mitsui-OSK	37	Weekly	W. Dimond	
Neptune Orient	18	Weekly	TRICOM	w.OOCL,NL
Nippon Liner	18	Weekly	Pacific Liner	w.OOCL,NOL
NYK	37	Weekly	Matson	
OOCL	18	Weekly	OOCL	w.NL,NOL
Westwood	5	Weekly	Westwood	

WEST COAST CONTAINER SERVICE

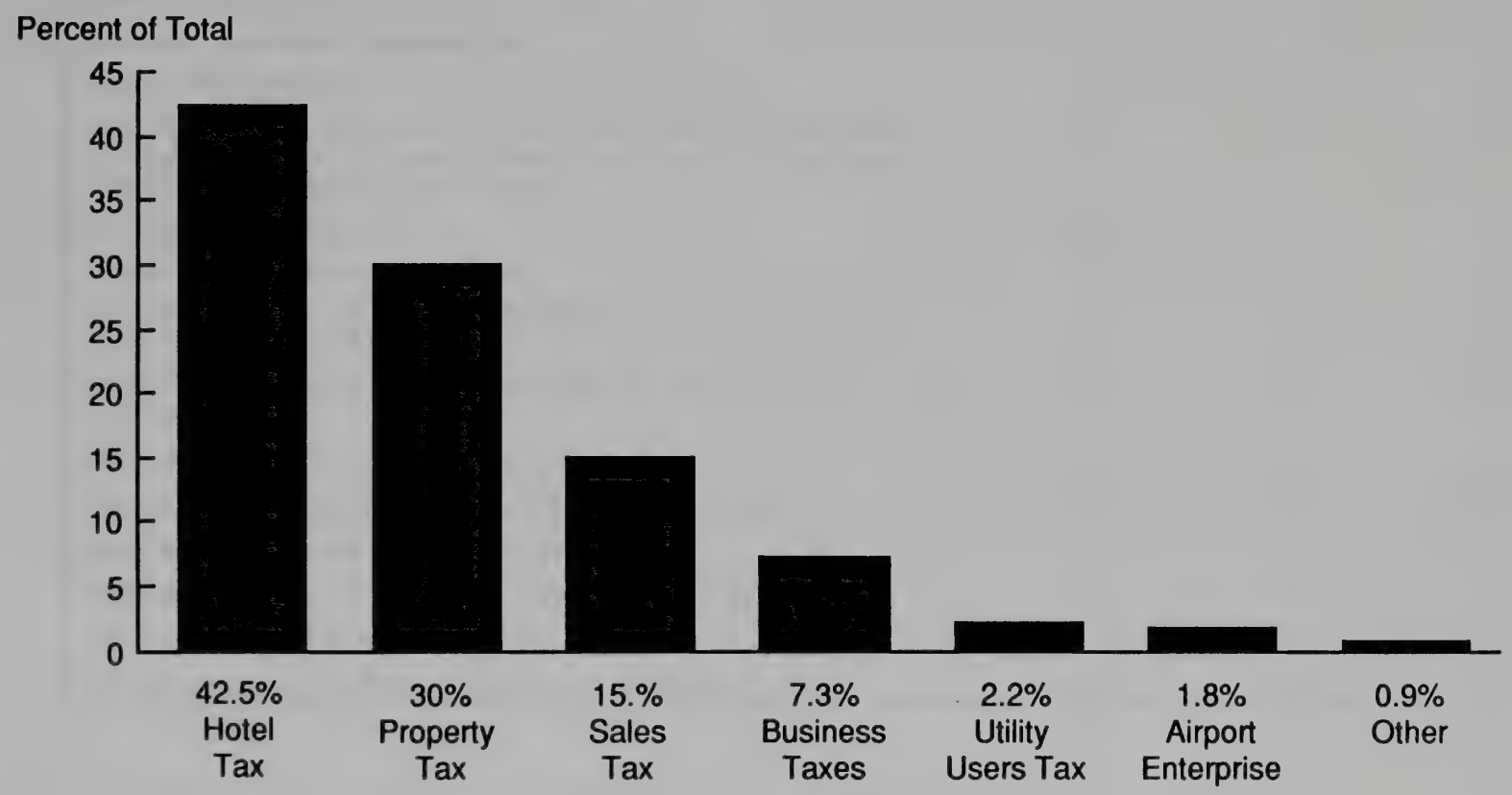
Tacoma

Line	Terminal	Frequency	Agency	Consortia
ACT PACE	4	Semimonthly	Interocean	
Blue Star	4	Semimonthly	Blue Star	
Columbus	4	Weekly	Matson	
ELMA	7	Semimonthly	W. Dimond	
Hoegh	4	Monthly	Hoegh	
Hyundai	Husky (7D)	Weekly	Sunrise	w.KLine
Kline	Husky (7D)	Weekly	Kerr	w.Hyundai
Maersk	4	Weekly	Maersk	
Navicana	7	Monthly	Matson	
NavieraPacif	7	Inducement	NorskPacific	
Nedlloyd	4	Semimonthly	Nedlloyd	
Sea Land	Tacoma (T2)	Semiweekly	Sea Land	
TOTE	TOTE	Weekly	TOTE	

AGGREGATE TRENDS

Port of San Francisco

Sources of Annual San Francisco City Revenues Generated By Visitor Spending



Source: Based on data collected for Economics Research Associates' 1987 report The Economic and Employment Impacts of Visitors to San Francisco conducted for the San Francisco Planning & Urban Research Association

PORT OF SAN FRANCISCO

Economic and Demographic Assumptions

National Assumptions	1990-1992	1993-1995	1996-2005
Annual Growth Rate of Real GNP	2.0%	2.4%	2.9%
Commercial Interest Rate	10.8%	9.9%	9.8%
Regional Economic Assumptions			
Annual Real Growth Rate in All Gross Exports	3.6%	3.0%	4.0%
Annual Real Growth Rate in High Tech and Information Technology Exports (computers, electronics, instruments, fraction of business services)	4.2%	3.6%	5.5%
Mortgage Interest Rate	12.4%	11.1%	10.8%
Annual Energy Cost Increases	6.5%	9.2%	6.6%
Annual Increase in Output per Worker (in real terms) over All Industries	1.5%	1.5%	1.1%
Annual Growth in Personal Consumption Expenditures (PCE) (in real terms)	1.3%	1.7%	1.4%
Annual Real Growth in Capital Spending	4.5%	2.6%	3.2%
Annual Growth in Gross Regional Product (GRP)	2.8%	2.6%	2.9%
Regional Demographic Assumptions			
Annual Growth Rate in Labor Force Participation	1.8%	1.6%	1.0%
Net Annual Regional Migration	21,600	32,500	36,500
Annual Percent Change in regional Household Size	-1.3%	-1.2%	-2.0%

Source: Association of Bay Area Governments, Projections '90, 1989.

PORT OF SAN FRANCISCO

San Francisco County Demographic Projections

	1980	1985	1990	1995	2000	2005
Population	678,974	718,500	740,800	746,600	767,800	774,300
Household Population	654,511	693,100	714,500	719,600	740,100	746,400
Households	298,956	308,020	314,400	321,300	328,300	334,700
Persons per Household	2.18	2.25	2.27	2.23	2.25	2.23
Employed Residents	347,091	381,900	402,400	408,100	413,700	418,400
Mean Household Income	$33,612	$37,900	$41,200	$42,900	$45,000	$47,100

Source: 1980 population data based on 1980 Census. Forecasts are for April 1 of each year. Base year employment data is estimated from the California Employment Development Department (EDD). Income is expressed in 1988 dollars. Base data for income comes from the 1980 Census, but adjusted by 1.092 to convert 1979 dollars to 1980 dollars. Then 1980 dollars were adjusted to 1988 dollars using the Bay Area CPI conversion factor of 1.498. For an explanation, see Glossary, Constant 1988 Dollars.

PORT OF SAN FRANCISCO

Projected Jobs by Industry in the San Francisco Bay Region

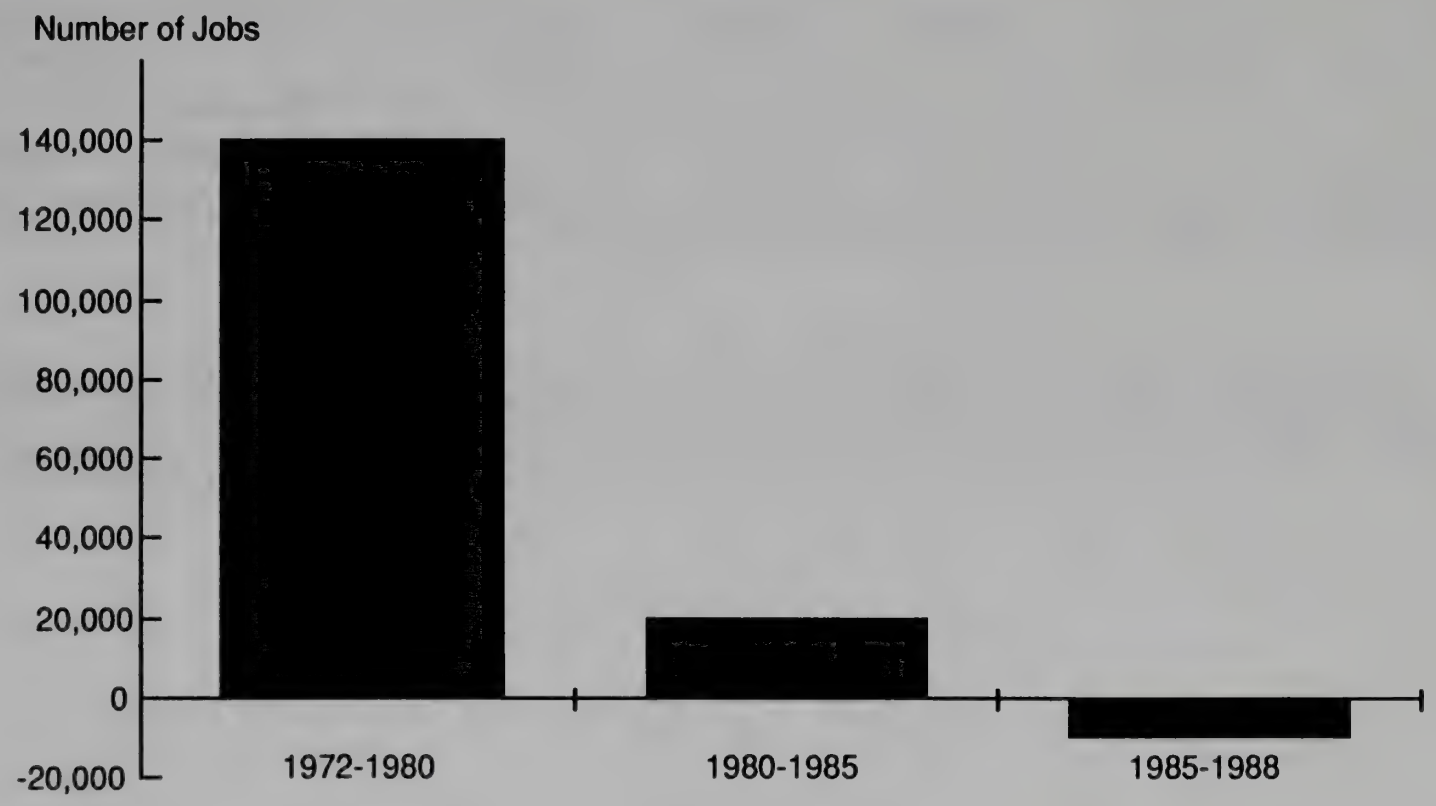
Industry	1980	1985	1990	1995	2000	2005
Agriculture, Forestry, Fisheries	34,809	29,650	28,070	26,610	24,820	22,290
Mining	3,752	4,310	5,590	5,720	5,370	5,400
Construction	128,004	145,040	167,970	191,400	209,440	224,920
Manufacturing	499,520	524,720	543,190	606,360	663,150	705,520
*High Technology**	242,950	284,750	291,820	344,260	391,150	417,110
Transportation, Communication, and Utilities	185,207	189,570	208,650	234,280	252,470	265,010
Wholesale Trade	115,060	131,380	146,960	167,940	187,570	211,420
Retail Trade	398,039	454,350	525,460	599,580	653,150	700,880
Finance, Insurance, Real Estate	214,384	228,580	250,090	278,590	300,100	320,830
Services	710,885	801,290	942,190	1,052,110	1,151,570	1,239,630
*Business Services**	183,382	234,900	307,230	360,820	414,710	469,410
Government	245,495	249,280	255,110	256,310	258,340	258,260
Total	2,535,155	2,758,170	3,073,280	3,418,900	3,705,980	3,954,160

*Not included in totals.

Source: Association of Bay Area Governments, Projections '90, 1989.

Port of San Francisco

Employment Growth in Durable Goods Manufacturing 1972 -1988



Source: ABAG and Annual Planning Information, California Employment Development Department

PORT OF SAN FRANCISCO

Bay Area Regional Demographic Projections

	1980	1985	1990	1995	2000	2005
Population	5,179,789	5,537,650	5,950,950	6,292,650	6,610,500	6,832,850
Household Population	5,058,620	5,402,000	5,800,850	6,136,750	6,442,400	6,656,950
Households	1,970,551	2,095,940	2,284,080	2,445,750	2,595,440	2,706,200
Persons per Household	2.57	2.58	2.54	2.51	2.48	2.46
Employed Residents	2,552,894	2,840,100	3,162,800	3,420,400	3,631,200	3,751,600
Mean Household Income	$39,736	$43,300	$46,200	$48,900	$51,500	$53,900

Source: 1980 population data based on 1980 Census. Forecasts are for April 1 of each year. Base year employment data is estimated from the California Employment Development Department (EDD). Income is expressed in 1988 dollars. Base data for income comes from the 1980 Census, but adjusted by 1.092 to convert 1979 dollars to 1980 dollars. Then 1980 dollars were adjusted to 1988 dollars using the Bay Area CPI conversion factor of 1.498.

PORT OF SAN FRANCISCO

Total Population Projections

County	1980	1985	1990	1995	2000	2005
San Francisco	678,974	718,500	740,800	746,600	767,800	774,300
Alameda	1,105,379	1,191,450	1,272,000	1,330,800	1,387,900	1,444,600
Contra Costa	656,380	706,250	790,000	861,000	913,000	946,900
Marin	222,568	223,400	232,200	240,350	249,750	258,350
Napa	99,199	102,600	108,900	115,800	121,850	127,350
San Mateo	587,329	607,850	637,300	655,950	675,600	681,850
Santa Clara	1,295,073	1,384,550	1,463,600	1,539,950	1,614,550	1,658,100
Solano	235,203	270,800	326,200	379,300	422,500	455,400
Sonoma	299,684	332,250	379,950	422,900	457,550	486,000
Regional Total	5,179,789	5,537,650	5,950,950	6,292,650	6,610,500	6,832,850

Source: Association of Bay Area Governments, Projections '90, 1989.

PORT OF SAN FRANCISCO

Household Projections

County	1980	1985	1990	1995	2000	2005
San Francisco	298,956	308,020	314,400	321,300	328,300	334,700
Alameda	426,093	451,750	491,610	519,520	547,320	572,420
Contra Costa	241,534	263,760	303,690	334,390	364,700	380,790
Marin	88,723	92,210	98,320	102,420	107,800	112,900
Napa	36,624	39,300	42,220	46,800	49,910	52,500
San Mateo	225,201	233,300	245,530	258,190	267,320	274,020
Santa Clara	458,519	487,780	525,900	561,950	596,660	617,490
Solano	80,426	91,200	112,710	133,260	149,750	162,880
Sonoma	114,475	128,620	149,700	167,920	183,680	198,500
Regional Total	1,970,551	2,095,940	2,284,080	2,445,850	2,595,440	2,706,200

Source: Association of Bay Area Governments, Projections '90, 1989.

PORT OF SAN FRANCISCO

Employed Resident Projections

County	1980	1985	1990	1995	2000	2005
San Francisco	347,091	381,900	402,400	408,100	413,700	418,400
Alameda	522,069	579,400	647,500	707,000	752,400	778,900
Contra Costa	307,476	346,900	407,800	456,700	495,000	512,600
Marin	118,560	125,700	135,200	141,200	148,600	154,600
Napa	43,197	47,000	52,900	58,300	63,000	67,200
San Mateo	314,091	331,900	358,000	375,400	385,900	387,200
Santa Clara	666,510	750,100	815,900	871,000	925,300	950,700
Solano	102,626	121,100	154,000	187,200	211,100	228,500
Sonoma	131,123	156,100	189,100	215,500	236,200	253,500
Regional Total	2,552,894	2,840,100	3,162,800	3,420,400	3,631,200	3,751,600

Source: Association of Bay Area Governments, Projections '90, 1989

PORT OF SAN FRANCISCO

Total Job Projections

County	1980	1985	1990	1995	2000	2005
San Francisco	552,200	553,440	578,920	616,930	642,810	671,940
Alameda	511,133	549,850	608,480	675,410	740,600	783,350
Contra Costa	201,237	232,510	292,700	334,710	361,870	389,440
Marin	77,853	89,530	99,950	114,910	123,680	132,660
Napa	35,870	39,920	47,100	52,790	59,020	65,530
San Mateo	259,795	273,350	303,600	336,810	361,200	378,850
Santa Clara	702,922	801,010	881,710	980,550	1,069,810	1,145,950
Solano	90,789	100,240	120,230	141,300	160,060	181,440
Sonoma	103,356	118,320	140,590	165,490	186,930	205,000
Regional Total	2,535,155	2,758,170	3,073,280	3,418,900	3,705,980	3,954,160

Source: Association of Bay Area Governments, Projections '90, 1989.

PORT OF SAN FRANCISCO

Mean Household Income Projections
(in constant 1988 dollars)

County	1980	1985	1990	1995	2000	2005
San Francisco	33,611	37,900	41,200	42,900	45,000	47,100
Alameda	35,609	37,800	40,100	43,000	45,100	46,900
Contra Costa	43,407	46,800	49,600	52,400	54,200	57,500
Marin	50,340	57,200	62,700	69,400	75,000	79,500
Napa	36,891	38,000	40,200	41,600	43,400	45,400
San Mateo	45,209	48,500	51,700	54,700	57,400	59,500
Santa Clara	43,370	48,600	52,100	54,800	58,000	60,300
Solano	34,510	35,400	37,200	39,500	42,800	45,800
Sonoma	34,391	36,600	38,000	40,400	42,600	45,000
Regional Total	39,736	43,300	46,200	48,900	51,500	53,900

Source: Association of Bay Area Governments, Projections '90, 1989.

PORT OF SAN FRANCISCO

San Francisco County Job Projections

	1980	1985	1990	1995	2000	2005
Agriculture, Mining	3,302	2,650	2,120	1,770	1,470	1,230
Construction	24,070	23,470	27,000	30,290	29,400	29,900
Manufacturing	48,772	43,480	43,500	44,980	45,510	45,220
*High Technology**	4,130	5,110	4,910	6,020	7,250	8,620
Transp., Comm., Utilities	66,072	60,700	51,650	55,790	56,990	58,530
Wholesale Trade	22,745	21,040	18,400	17,500	17,900	18,500
Retail Trade	69,339	74,710	83,700	91,200	95,140	98,630
F.I.R.E.	85,343	81,800	80,400	88,350	93,090	100,810
Services	171,895	185,120	210,930	230,080	246,420	261,520
*Business Services**	61,470	69,760	85,670	97,600	105,500	114,800
Government	60,662	60,470	61,310	56,970	56,890	57,600
Total	552,200	553,440	578,920	616,930	642,810	671,940

*Not included in totals.

Source: 1980 population data based on 1980 Census. Forecasts are for April 1 of each year. Base year employment data is estimated from the California Employment Development Department (EDD). Income is expressed in 1988 dollars. Base data for income comes from the 1980 Census, but adjusted by 1.092 to convert 1979 dollars to 1980 dollars. Then 1980 dollars were adjusted to 1988 dollars using the Bay Area CPI conversion factor of 1.498.

PROPERTY SUMMARY

Port of San Francisco

Property Summary

Use Category	Square Ft.	% of Total Sq.Ft.	# of Tenants	% of Total Tenants	Average Sq. Ft./ Tenant	Total Rent Revenue	Average Rent/Sq. Ft./Year	Other Income	Total Revenue	Average Rev/Sq. Ft./Year
Office	623,273	2.4%	159	36.1%	3,920	$ 3,956,937	$6.35	$ 0	$ 3,956,937	$6.35
Food/Retail	1,331,895	5.0	52	11.8	25,613	6,118,432	4.59	0	6,118,432	4.59
Parking	949,590	3.6	26	5.9	36,523	1,508,522	1.59	1,291,478	2,800,000	2.95
Non-Maritime Industry	719,709	2.7	33	7.5	21,809	1,132,390	1.57	0	1,132,390	1.57
Storage/Warehousing	474,699	1.8	50	11.4	9,494	1,022,316	2.15	0	1,022,316	2.15
Marine Cargo	7,449,391	28.2	19	4.3	392,073	526,255	0.07	7,306,000	7,832,255	1.05
Other Maritime	5,789,254	21.9	48	10.9	120,609	3,806,153	0.66	3,240,000	7,046,153	1.22
Unused Space	4,951,647	18.7	N/A	0.0	N/A	137,783	N/A	0	137,783	N/A
SF Redevelopment Agency	2,478,274	9.4	1	0.2	2,478,274	222,722	0.09	0	222,722	0.09
Miscellaneous	672,273	2.5	52	11.8	12,928	427,955	0.64	0	427,955	0.64
Public Roads, Common Space, Public Access	1,000,000	3.8	N/A	0.0	N/A	N/A	N/A	0	0	N/A
Total	26,440,005	100%	440	100%	60,091	$18,859,465	$0.71	$11,837,478	$30,696,943	$1.16

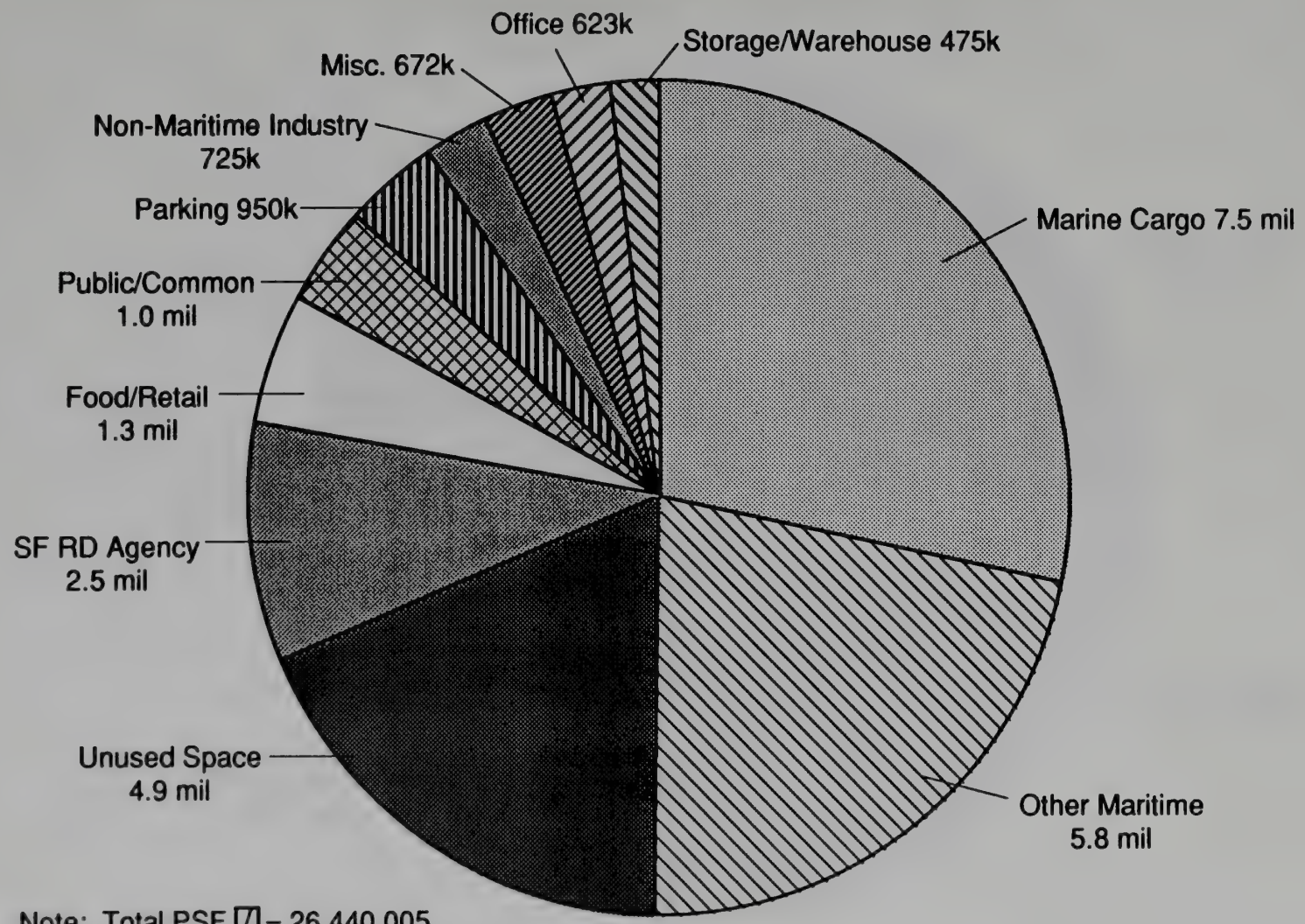
Other Income (Estimated)

Finance and Administration		
- Interest Income	$ 4,500,000	$ 4,500,000
- Miscellaneous	700,000	700,000
Engineering	0	0
Maintenance	100,000	100,000
	$ 5,300,000	$ 5,300,000
Total Revenue		$35,996,943

Source: Port of San Francisco

Port of San Francisco

Property Summary
Total Square Feet By Use



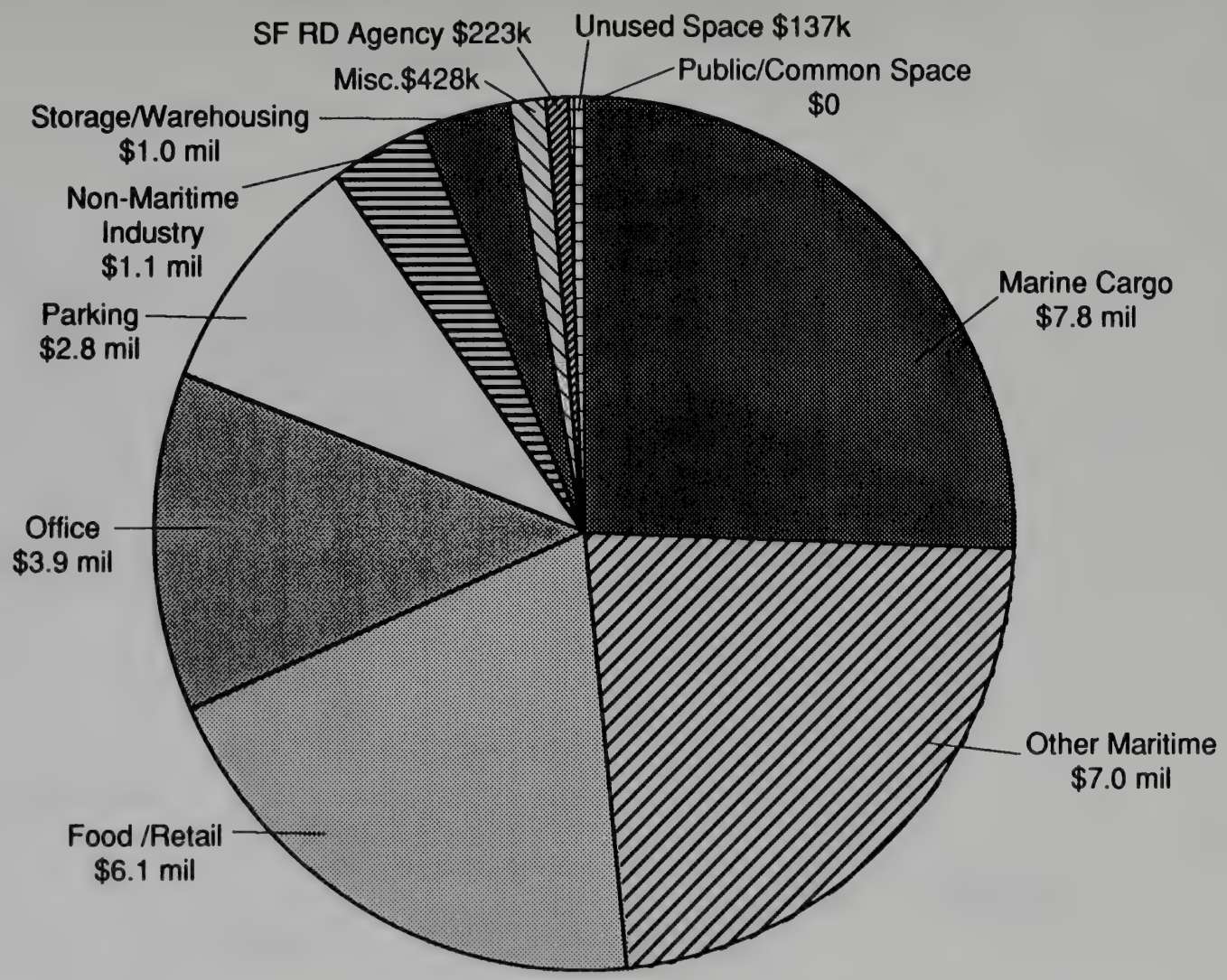
Note: Total PSF ☑ = 26,440,005

(approximately 600 acres)

Source: Port of San Francisco, 1989

Port of San Francisco

Property Summary
Total Property Revenue By Use

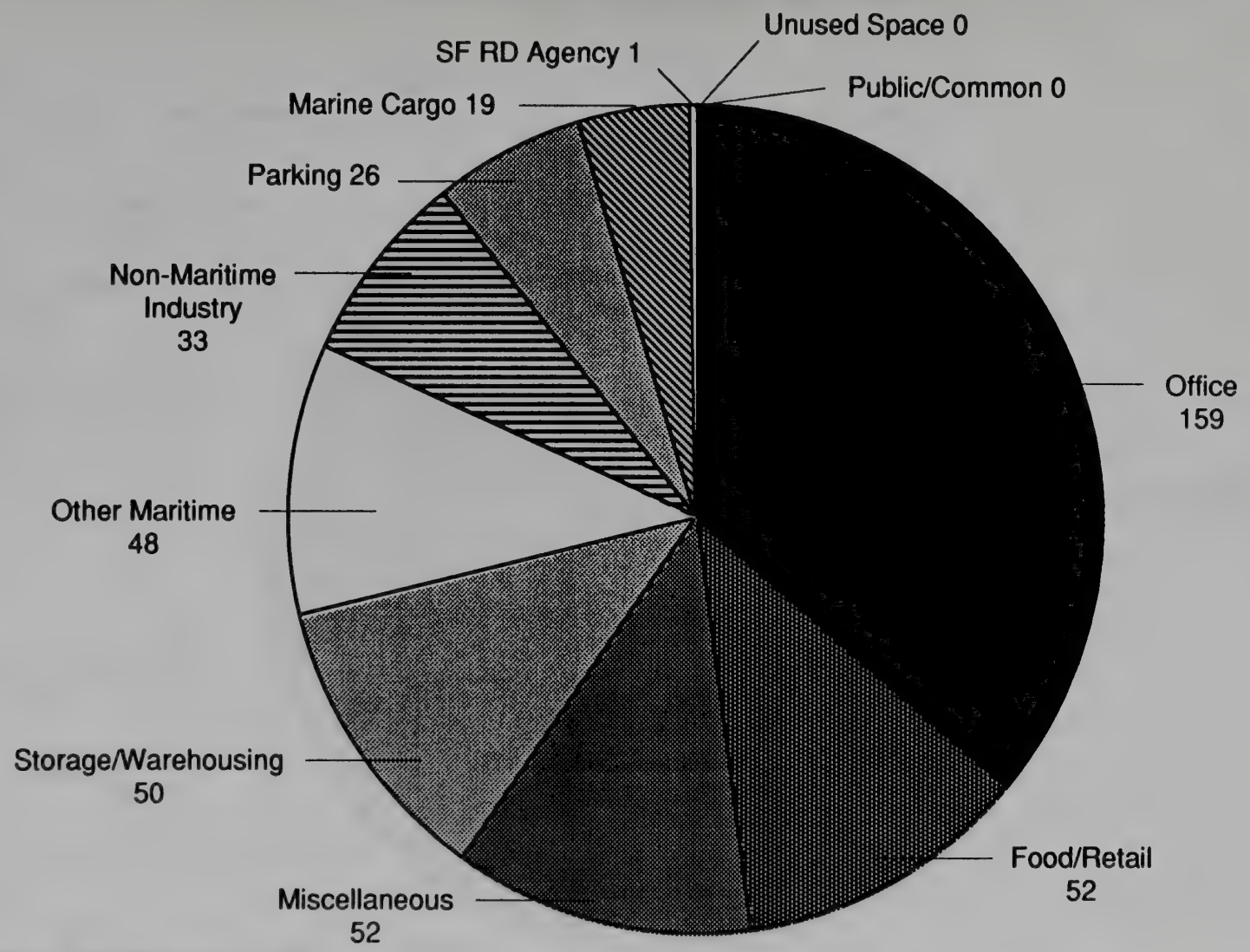


Note: Total property revenue = $30,696,943

Source: Port of San Francisco, 1989

Port of San Francisco

Property Summary
Number Of Tenants By Use

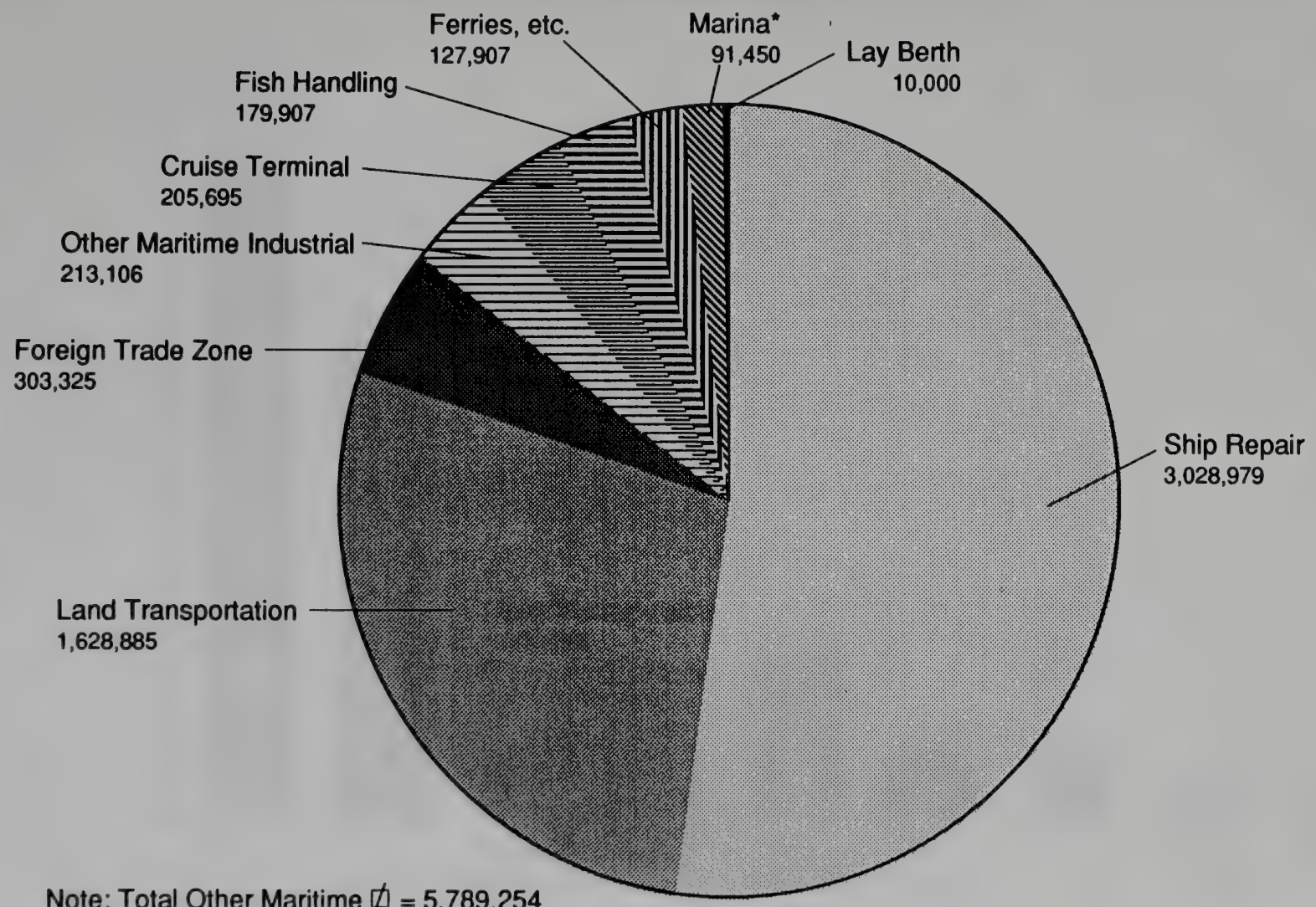


Note: Total tenants = 440

Source: Port of San Francisco, 1989

Port of San Francisco

Property Summary
Breakdown Of "Other Maritime"
(Square Feet)



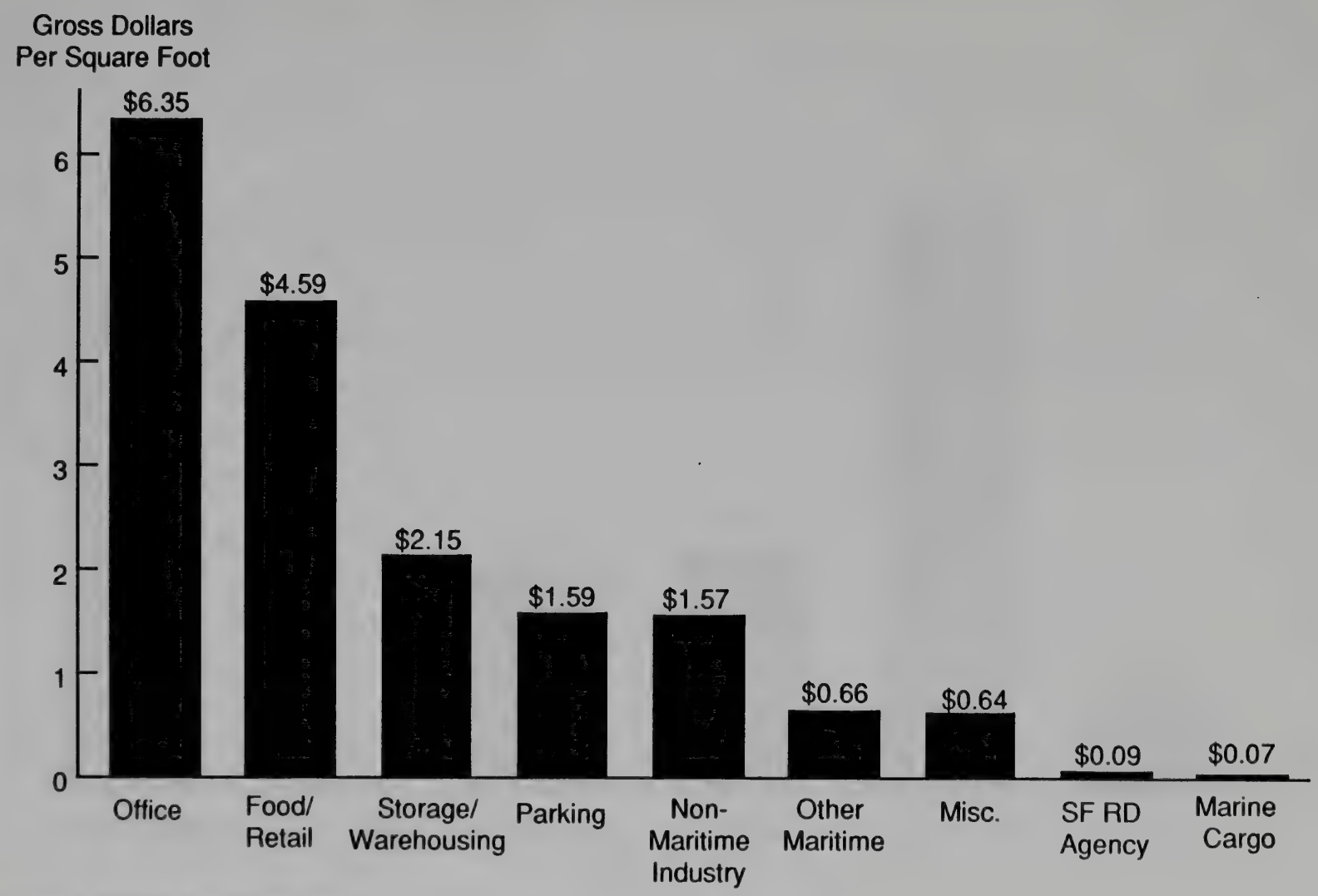
Note: Total Other Maritime ∅ = 5,789,254

* Category does not include SF RD Agency South Beach Marina

Source: Port of San Francisco, 1989

Port Of San Francisco

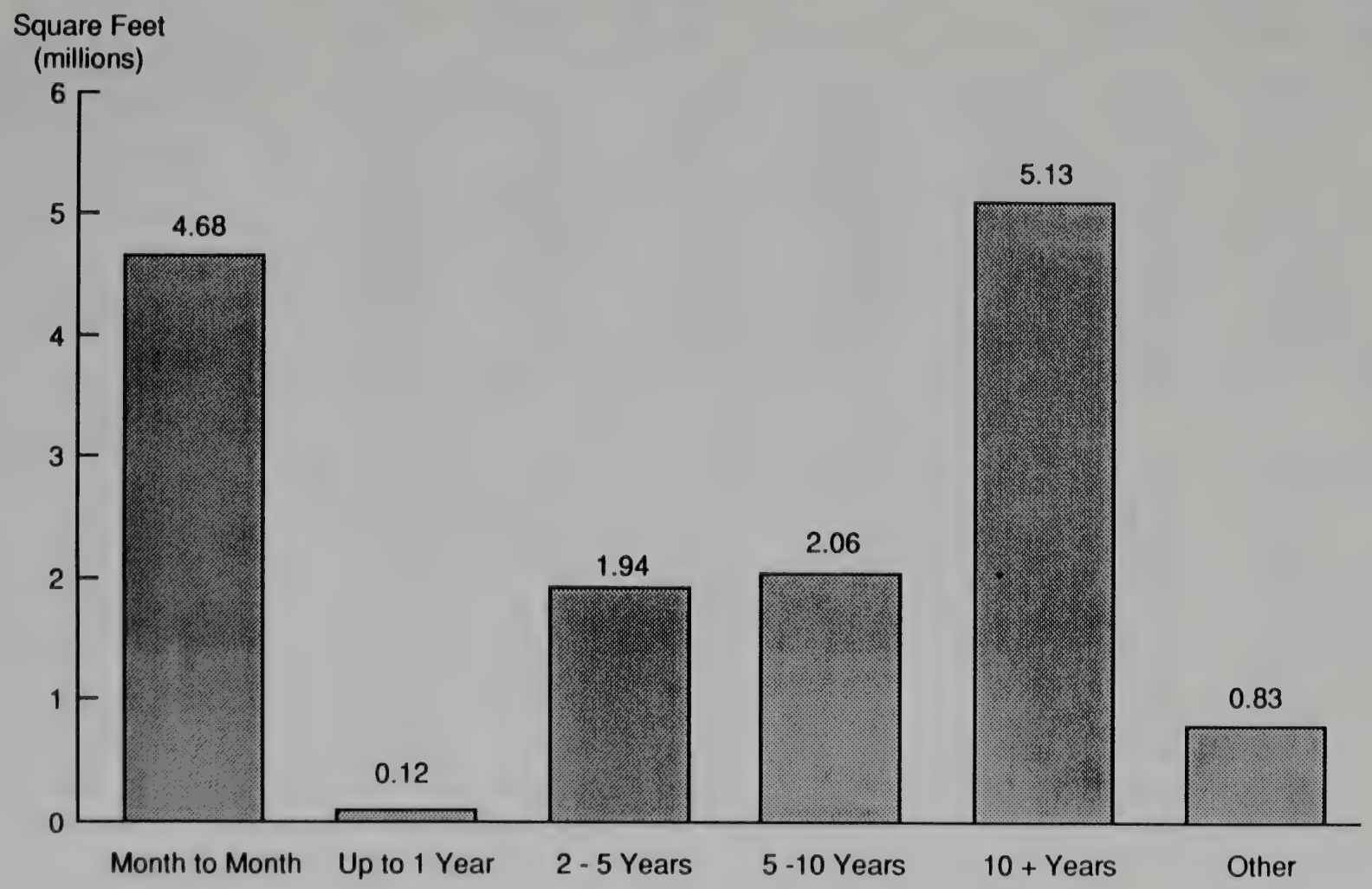
Property Summary
Average Annual Rent Per Square Foot By Use Code



Source: Port of San Francisco

Port Of San Francisco

Property Summary
Square Feet By Lease Expiration



Source: Port of San Francisco

San Francisco Port Commission

SALES AND RENT REPORT
JUNE 1989

	Current Year To Date				Prior Year To Date			
	Sales	Minimum Rent	Percentage Rent Over Min. Rent	Total Rent	Sales	Minimum Rent	Percentage Rent Over Min. Rent	Total Rent
Fisherman's Wharf Restaurants								
Alioto's	$ 6,875,422	$ 91,908	$ 275,721	$ 367,629	$ 6,368,713	$ 91,908	$ 249,288	$ 341,196
Carnation Co. & Boudin Bakery	3,721,545	81,048	110,633	191,681	3,476,091	81,048	97,604	178,652
Castagnola's	3,599,655	111,228	83,278	194,506	3,865,550	111,228	97,047	208,275
Chez Laura Enterprises	1,066,393	23,640	52,240	75,880	880,209	23,639	37,453	61,092
Fish Alley Bar & Grill	962,554	34,296	25,221	59,517	662,735	34,296	7,159	41,455
Fisherman's Grotto #9	7,575,256	145,728	251,535	397,263	7,838,736	145,728	263,827	409,555
Franceschi, Lena	458,794	20,100	7,592	27,692	483,261	20,100	8,238	28,338
Franciscan Restaurant	4,162,081	102,855	135,165	238,020	3,670,693	87,420	119,540	206,960
Gelardi's	479,555	16,116	9,521	25,637	620,975	15,665	19,350	35,015
Lighthouse	1,397,681	9,420	63,402	72,822	1,424,187	9,420	64,611	74,031
Patio Sandwich Shop	156,835	1,896	10,938	12,834	201,968	1,896	14,878	16,774
Pompei's Grotto	1,129,564	61,524	4,064	65,588	1,141,430	61,524	3,747	65,271
Sabella & La Torre	2,359,553	13,620	108,694	122,314	2,057,273	13,620	92,865	106,485
Scoma's Restaurant	11,550,497	121,320	560,595	681,915	11,076,262	121,320	531,331	652,651
Tarantino's	2,947,124	67,428	89,536	156,964	2,904,484	67,428	86,589	154,017
Sub-total	$48,442,506	$902,127	$1,788,135	$2,690,262	$46,672,567	$886,240	$1,693,527	$2,579,767
% over prior year	4%	2%	6%	4%				
Fisherman's Wharf - Other								
Alcatraz	$ 0	$ 2,270	$ 0	$ 2,720	$ 43,565	$ 8,160	$ 3,000	$ 11,160
Cable Car Charters	987,218	12,000	86,722	98,722	953,945	12,000	83,394	95,394
Coast Marine & Ind. Supply	131,715	58,320	0	58,320	167,504	58,320	0	58,320
Commodore Helicopters	0	0	0	0	1,548,634	8,720	115,176	123,986
Cory Gallery	563,557	37,824	5,935	43,759	598,535	37,824	10,236	48,060
Cresci Brothers	951,617	5,328	45,573	50,901	851,239	5,328	41,294	46,622
Eleanor & Barney Silver	69,174	2,040	6,608	8,648	81,316	2,040	8,124	10,164
Franciscan Parking	482,109	69,120	226,898	296,018	425,813	69,120	207,658	276,778
Frank's Fisherman's Supply	359,784	21,528	14,449	35,977	365,586	21,528	15,030	36,558
Guardino Gift	1,389,562	6,780	70,089	76,869	1,372,396	6,780	70,432	77,212
Harbor Tours, Inc.	4,646,726	204,996	16,670	221,666	4,644,305	204,996	22,876	227,872
Maskell, Don	1,421,673	48,844	73,375	122,219	1,549,304	40,704	95,449	136,153
National Maritime Museum	578,523	6,480	29,866	36,346	617,318	6,480	30,583	37,063
S.F. Parking Pier 45	60,677	0	39,442	39,442	47,810	0	31,279	31,279
Shang-Cheng Fang	39,305	12,000	0	12,000	18,887	7,000	0	7,000
Woods Associates	100,326	1,656	8,370	10,026	128,970	1,656	$ 11,235	12,891
Sub-total	$11,781,966	$489,636	$ 623,997	$1,113,633	$13,415,127	$490,656	$ 745,766	$1,236,422
% over prior year	-12%	0%	-16%	-10%				

Source: Port of San Francisco

	Current Year To Date				Prior Year To Date			
	Sales	Minimum Rent	Percentage Rent Over Min. Rent	Total Rent	Sales	Minimum Rent	Percentage Rent Over Min. Rent	Total Rent
Other Restaurants								
Bay Corporation	$ 1,022,618	$ 93,624	$ 360	$ 93,984	$ 1,081,463	$ 93,624	$ 2,068	$ 95,692
Blue Jeans Equities West	3,099,148	30,084	176,027	206,111	3,010,689	28,650	171,548	200,198
Bounty	83,763	7,816	466	8,282	109,683	8,931	1,263	10,194
Boondocks	319,339	22,080	6,545	28,625	325,420	22,080	7,185	29,265
California Cafe Restaurant	2,079,544	167,206	0	167,206	2,251,931	160,692	74	160,766
Ferry Terminal Conference Room	41,430	9,576	0	9,576	47,524	9,576	0	9,576
La Fete Gourmet Deli	135,713	6,900	1,272	8,172	132,246	9,045	2,486	11,531
Mission Rock Resort	791,844	6,420	48,499	54,919	930,499	6,420	57,264	63,684
Olive Oil's	308,990	11,502	15,840	27,342	302,681	10,977	14,145	25,122
Pastorino, Blanche	0	0	0	0	0	2,662	0	2,662
Peer Inn	289,844	23,364	2,845	26,209	248,836	23,364	258	23,622
Pier I	215,479	12,420	893	13,313	215,543	12,011	1,223	13,234
Pier 23 Cafe	982,765	24,000	44,793	68,793	822,033	24,000	35,402	59,402
Pier 80 Inn	163,911	3,384	6,279	9,663	194,308	3,384	7,987	11,371
Ship Restaurant	473,828	24,120	0	24,120	476,786	24,120	0	24,120
Sinbad's	2,344,196	159,612	39,314	198,926	2,433,574	159,612	46,826	206,438
South Beach Harbor Light	49,411	8,280	0	8,280	56,027	8,280	0	8,280
Waterfront	4,442,657	43,920	243,842	287,762	4,116,805	43,920	222,942	266,862
Sub-total	$ 16,844,480	$ 654,308	$ 586,975	$1,241,283	$16,756,048	$ 651,348	$ 570,671	$1,222,019
% over prior year	1%	0%	3%	2%				
Other Retail								
B & I Boats	$ 13,261	$ 12,444	$ 0	$ 12,444	$ 14,725	$ 12,444	$ 0	$ 12,444
Bay Blossoms	18,166	1,879	247	2,126	18,651	1,878	345	2,223
Burger Car Wash	447,092	144,744	236	144,980	480,224	144,744	1,586	146,330
Burger Parking Lot	176,424	46,152	86,167	132,319	480,970	78,028	282,702	360,730
Burger Stand Services Station	204,931	20,280	113,112	133,392	191,537	20,280	104,567	124,847
Carriage Charter	191,172	9,000	10,112	19,112	200,431	7,900	12,138	20,038
GVS Parking (Calif Cafe Rest.)	104,132	0	20,826	20,826	99,951	0	19,990	19,990
Hornblower Yachts, Inc.	5,383,432	210,288	226,424	436,712	5,045,367	200,520	213,806	414,326
Metropolitan Parking - Pier 7	336,523	162,000	73,568	235,568	309,459	162,000	54,622	216,622
Metropolitan Parking - SWL 321	343,566	96,120	178,733	274,853	117,393	28,569	65,345	93,914
Mobil Oil Station	64,236	16,812	0	16,812	74,942	16,812	0	16,812
National Car Rental\New York	477,228	50,124	2,270	52,394	446,359	55,404	355	55,759
New York Frankfurter Co.	65,839	5,844	1,868	7,712	75,063	5,844	2,532	8,376
Pacific Telephone	140,022	0	22,205	22,205	127,804	0	16,244	16,244
Pier 33, Inc.	346,060	38,464	0	38,464	342,127	36,508	0	36,508
Pier 39	13,513,343	500,002	467,469	967,471	12,861,037	500,002	412,915	912,917
Recreation Rest	0	0	0	0	0	2,266	0	2,266
S. F. Mini Storage	470,641	45,696	2,253	47,949	440,612	45,696	1,134	46,830
S. F. Parking Inc.	8,822	0	6,617	6,617	8,736	0	6,552	6,552
St. Francis Marine Center	1,980,354	128,982	26,837	155,819	1,664,260	122,955	0	122,955
Smith, Cordell	4,709	1,150	0	1,150	1,968	696	0	696
S & S Trailer Repair	20,478	5,500	0	5,500	33,689	6,000	0	6,000
Sub-total	$ 24,310,431	$1,495,481	$1,238,944	$2,734,425	$23,035,305	$1,448,546	$1,194,833	$2,643,379
% over prior year	6%	3%	4%	3%				
Total	$101,379,383	$3,541,552	$4,238,051	$7,779,603	$99,879,047	$3,476,790	$4,204,797	$7,681,587
% over prior year	2%	2%	1%	1%				

Source: Port of San Francisco

LAND USE OPTIONS

Convention/Exhibition: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per $1 Million Revenue	Maximum Potential Impacts In Fifth Year
■ San Francisco has been a leading convention site in the U.S. ■ Substantial facilities already exist in San Francisco (Moscone, Brooks, hotels) ■ Large additions to existing space have already been planned ■ Impact of earthquake on demand is still unclear; historical growth has been 4% per year ■ Port currently has no convention/exhibition space	■ Port can develop 200,000 square feet as convention/exhibition space to enter market ■ Port can keep pace with 4% per year market growth ■ Total revenues geneated will equal $30 per square foot	■ Port Income: $80,000 ■ Jobs: 11 ■ City Taxes: $46,000	■ Port Income: $600,000 ■ Jobs: 100 ■ City Taxes: $350,000

Cruise Ships: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per $1 Million Revenue	Maximum Potential Impacts In Fifth Year
■ Worldwide cruise demand expected to grow by 10% ■ Fastest growing segment is starter cruises (6-8 days); San Francisco's strongest product is longer cruises (14+ days) ■ Vancouver and Los Angeles are powerful competitors on the West Coast ■ Jones Act limits foreign cruise ships to 1 USA stop per cruise ■ Number of San Francisco embarkations has declined by 29% since 1980 ■ San Francisco cruise lines generate $33M per year in revenues	■ Port's cruise ship business will grow by 10% per year	■ Port Income: $20,000 ■ Jobs: 21 ■ City Taxes: $5,000	■ Port Income: $450,000 ■ Jobs: 450 ■ City Taxes: $100,000

Dedicated Public Access: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per 100,000 Square Feet	Maximum Potential Impacts In Fifth Year
■ High demand for dedicated public access to waterfront ■ Dedicated public access projects are typically expensive and non-revenue generating	■ Port develops 800,000 square feet available into dedicated public access space ■ Port will not convert space reserved for maritime into dedicated public access	■ Port Income: $0 ■ Jobs: 3 ■ City Taxes: $0	■ Port Income: $0 ■ Jobs: 50 ■ City Taxes: $0

Ferries: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per $1 Million Revenue	Maximum Potential Impacts In Fifth Year
■ Stable, but flat market for ferries/excursions in Bay Area ■ Increased post-earthquake demand has subsided with reopening of Bay Bridge ■ Port has no competitors ■ No dramatic changes in ferry/excursion ship technology are expected ■ Current Port ferry/ excursion tenants generate $13M per year in total revenue	■ Port's ferry/excursion business will mirror Bay Area population growth of 2% per year	■ Port Income: $30,000 ■ Jobs: 20 ■ City Taxes: $4,900	■ Port Income: $50,000 ■ Jobs: 50 ■ City Taxes: $50,000

Fisheries: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per $1 Million Revenue	Maximum Potential Impacts In Fifth Year
■ Seafood is fastest growing segment of the U.S. food market ■ San Francisco's competitive advantages over other California ports include a large local market and its existing facilities ■ Seafood Center proposal includes 20% net increase in demand ■ Fishermen report projects 45% net growth ■ No shortage of demand for berthing and processing space in San Francisco ■ Port's fishing industry currently generates $48M in revenues per year	■ Port's fishing business will grow by 10% per year	■ Port Income: $10,000 ■ Jobs: 11 ■ City Taxes: $3,000	■ Port Income: $300,000 ■ Jobs: 350 ■ City Taxes: $100,000

Hotels: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per $1 Million Revenue	Maximum Potential Impacts In Fifth Year
■ Demand for lodging space is expected to continue to grow at 2% per year ■ Including existing and planned lodging space, a 500-room shortfall is expected by year 2000 ■ Currently no hotels on Port land	■ Port can develop a total of 500 rooms over next five years ■ Total revenue generated is $22,000 per room	■ Port Income: $80,000 ■ Jobs: 27 ■ City Taxes: $64,000	■ Port Income: $950,000 ■ Jobs: 350 ■ City Taxes: $750,000

Housing: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per 100,000 Square Feet	Maximum Potential Impacts In Fifth Year
■ Virtually unlimited demand for housing in San Francisco; projected shortfall of 7400 units in 1995 ■ Currently planned housing projects (including Mission Bay) do not meet projected shortfall in Year 1995 ■ Annual price escalation of 15-20% ■ Port offers a unique Waterfront setting ■ Port currently has no housing on its property	■ Port can develop 800,000 square feet as housing ■ Port will not convert space reserved for maritime into housing	■ Port Income: $302,400 ■ Jobs: 0 ■ City Taxes: $119,000	■ Port Income: $2.5 million ■ Jobs: 0 ■ City Taxes: $950,000

Light Industrial: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per 100,000 Square Feet	Maximum Potential Impacts In Fifth Year
■ Decreasing demand for light industrial capacity in San Francisco ■ Demographic projections predict strong competition for industrial tenants from San Francisco's suburbs ■ Waterfront industrial space has no advantages over interior space for non-maritime tenants ■ Port currently receives $150,000 rent income from industrial tenants	■ Port can attract a new 100,000 square foot tenant each year	■ Port Income: $110,000 ■ Jobs: 83 ■ City Taxes: $17,000	■ Port Income: $600,000 ■ Jobs: 450 ■ City Taxes: $100,000

Office: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per $1 Million Revenue	Maximum Potential Impacts In Fifth Year
■ Demand for office space in financial district and vicinity expected to continue to increase by 4% per year (historical average) ■ Current planned and proposed supply to the year 2000, represents a 72% increase in available office space ■ Additional expansion is limited by Proposition M to 475,000 sq. ft. per year ■ Port property is exempt from Proposition M ■ Port office tenants currently generate $248M per year in revenues	■ Revenue generated by current/potential office tenants will grow by 4% per year ■ Port will continue to offer current mix of Class B and C space	■ Port Income: $20,000 ■ Jobs: 24 ■ City Taxes: $7,700	■ Port Income: $1.1M ■ Jobs: 1,300 ■ City Taxes: $450,000

Parking: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per 100,000 Square Feet	Maximum Potential Impacts In Fifth Year
■ Demand greatly exceeds supply in San Francisco ■ Limited space available in San Francisco for parking development ■ Port currently has 950,000 square feet of parking space	■ Port can develop 800,000 square feet available and still not satisfy demand ■ Port will not convert space reserved for maritime into parking	■ Port Income: $220,000 ■ Jobs: 4 ■ City Taxes: $550	■ Port Income: $1.8M ■ Jobs: 50 ■ City Taxes: $50,000

Recreation: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per 100,000 Square Feet	Maximum Potential Impacts In Fifth Year
■ High demand for waterfront recreational space ■ Recreational space development is typically expensive and unprofitable	■ Port develops 800,000 square feet available into recreational space ■ Port will not convert space reserved for maritime into recreational space	■ Port Income: $0 ■ Jobs: 5 ■ City Taxes: $0	■ Port Income: $0 ■ Jobs: 50 ■ City Taxes: $0

Restaurants: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per $1 Million Revenue	Maximum Potential Impacts In Fifth Year
■ Significant demand growth of 12% per year expected in San Francisco ■ Substantial competition within San Francisco ■ Existing restaurants have substantial competitive advantage over start-ups ■ Port can offer unique waterfront dining environment ■ Current Port restaurants generate $52 million per year revenues	■ Port's restaurant business will keep pace with San Francisco's expected growth of 12% per year	■ Port Income: $80,000 ■ Jobs: 35 ■ City Taxes: $14,000	■ Port Income: $3.2M ■ Jobs: 1,400 ■ City Taxes: $600,000

Retail: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per $1 Million Revenue	Maximum Potential Impacts In Fifth Year
■ Continued strong demand for retail goods and services through 1995; total Bay Area industry revenues expected to increase 5% per year ■ Substantial competition from existing retailers; Union Square, Pier 39, local shopping centers ■ Port can offer unique waterfront shopping environment ■ Port retailers currently generating $62M per year in revenues	■ Port's retail business will keep pace with Bay Area growth of 5% per year	■ Port Income: $50,000 ■ Jobs: 13 ■ City Taxes: $5,000	■ Port Income: $900,000 ■ Jobs: 250 ■ City Taxes: $100,000

Ship Repair: Potential Impact Analysis

Market Context	Optimistic Future Performance Assumption(s) For Next Five Years	Expected Impacts Per $1 Million Revenue	Maximum Potential Impacts In Fifth Year
■ Industry is in substantial decline in Bay Area; jobs are down 60% in past five years ■ Strong competition from foreign ship repair yards with cheap labor ■ Fewer opportunities for military contracts ■ Port's ship repair yards currently generating $149M in total revenue per year	■ No growth, but maintain current levels of business	■ Port Income: $20,000 ■ Jobs: 14 ■ City Taxes: $7,000	■ Port Income: $0 ■ Jobs: 0 ■ City Taxes: $0

Port of San Francisco

FACT SHEET - SAN FRANCISCO SHIPYARDS

- In the last 20 years, skilled labor shipyard jobs dropped from 20,000 to 2,000.
  - In the last five years from 5,000 to 2,000.
- The Bay Area has gone from 34 ships to 16 ships Homeported in the San Francisco Bay Area.
- Nine major viable shipyards have left within the last 20 years.
  - Five in the last 5 years.
- Only 3 major shipyards remain, which employ less than 2,000 skilled blue collar workers, averaging $35,000 a year, and representing 11 different trade unions.
- Forty-five per cent of shipyard workers are minorities and 50% are residents of San Francisco.
  - 18% or 360 Hispanic
  - 15% or 300 Asians
  - 11% or 220 Black
  - 1% American Indian.
- The shipyards in San Francisco contribute 2.5 million dollars annually in rent revenue to the Port of San Francisco.
- Sixty per cent of all work in all major shipyards presently is military, and forty per cent commercial/private shipping companies.
- San Francisco shipyards contribute over $600,000 in payroll taxes.
- San Francisco shipyards pay over $500,000 per year in possessory interest tax (similar to property tax).

Source: Golden Gate Ship Repair Association, October 1988.

Port of San Francisco

ANNUAL COMMERCIAL FISH LANDINGS
(1967 TO 1987)

Year	Total Volume (in pounds)	Total Value
1967	5,934,729	$ 683,339
1968	3,682,704	574,783
1969	3,401,143	645,471
1970	4,529,068	741,946
1971	6,327,878	976,063
1972	8,145,789	1,303,843
1973	8,872,475	1,211,534
1974	9,724,050	1,568,313
1975	8,526,944	1,511,491
1976	10,691,790	2,048,698
1977	15,887,693	3,154,936
1978	14,952,895	4,257,478
1979	16,569,055	6,678,845
1980	20,865,154	11,344,143
1981	20,233,260	7,003,805
1982	28,703,634	9,504,079
1983	19,919,821	11,059,188
1984	18,771,630	5,733,161
1985	25,115,127	8,934,007
1986	21,515,286	7,855,594
1987	20,522,383	8,637,494
20 Year Totals:	292,892,508	$95,428,211

Source: California Department of Fish and Game.

Port of San Francisco

ANNUAL GREATER BAY AREA LANDINGS
AND PORT OF SAN FRANCISCO MARKET SHARE
(1960 TO 1987)

Year	Bay Area Landings (in pounds)	Port of San Francisco As Per Cent Of Total Area
1960	44,263,467	76%
1961	41,440,225	79
1962	43,830,164	83
1963	39,997,051	75
1964	31,223,268	75
1965	17,688,059	59
1966	16,286,927	56
1967	12,452,218	48
1968	9,788,224	38
1969	8,901,993	38
1970	14,183,162	32
1971	18,215,126	35
1972	17,070,709	48
1973	18,276,028	49
1974	19,122,405	51
1975	18,205,797	47
1976	21,986,366	49
1977	29,674,779	54
1978	29,281,255	51
1979	29,075,207	57
1980	36,718,798	57
1981	41,231,474	49
1982	56,320,953	51
1983	41,997,873	47
1984	38,646,672	49
1985	43,105,464	58
1986	49,766,970	43
1987	49,221,112	42
Totals:	837,971,746	

Source: California Department of Fish and Game.

Port of San Francisco

CALIFORNIA ANNUAL COMMERCIAL FISH LANDINGS BY STATISTICAL AREA

	Millions Of Dollars								
Statistical Area	1979	1980	1981	1982	1983	1984	1985	1986	1987
San Francisco	$18.73	$26.98	$20.81	$25.60	$22.21	$16.86	$20.79	$23.64	$29.53
Monterey	10.80	8.83	11.59	9.45	8.71	7.31	7.91	8.97	9.76
Eureka	37.68	28.99	33.72	31.26	19.37	19.77	27.48	31.96	42.67
Northern California	67.21	64.80	66.11	66.39	50.28	43.93	56.18	64.61	81.96
Total California	$339.69	$457.76	$286.62	$363.07	$186.09	$163.22	$132.81	$171.00	$215.97

San Francisco Statistical Area Contribution To Northern California Landings:

27.9%	41.6%	31.5%	38.6%	44.2%	38.4%	37.0%	36.7%	36.0%

San Francisco Area Contribution To California Landings:

5.5%	5.9%	7.3%	7.1%	11.9%	10.3%	15.7%	13.9%	13.7%

Source: Hagemeyer-Sanchez & Associates.

Port of San Francisco

CALIFORNIA ANNUAL COMMERCIAL FISH LANDINGS BY STATISTICAL AREA

	Millions Of Pounds								
Statistical Area	1979	1980	1981	1982	1983	1984	1985	1986	1987
San Francisco	29.08	36.72	41.23	56.32	42.00	38.65	43.11	49.77	49.22
Monterey	55.81	38.25	56.42	49.20	31.91	45.83	29.63	32.28	31.55
Eureka	76.79	72.61	74.56	73.93	50.85	50.62	66.12	70.49	85.09
Northern California	161.68	147.58	172.21	179.45	124.75	135.09	138.86	152.54	165.86
Total California	968.35	1009.90	790.35	824.26	513.20	444.90	367.12	422.60	642.08

San Francisco Statistical Area Contribution To Northern California Landings:

18.0%	24.9%	23.9%	31.4%	33.7%	28.6%	31.0%	32.6%	29.7%

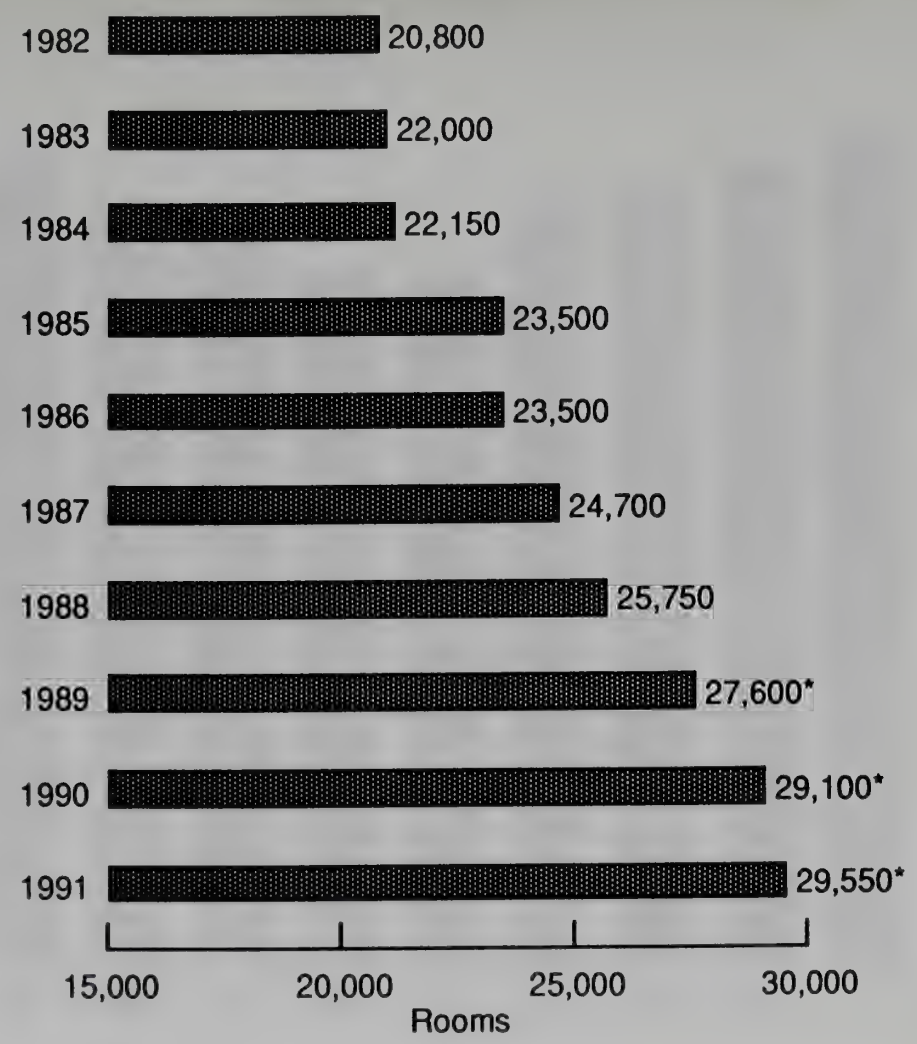
San Francisco Area Contribution To California Landings:

3.0%	3.6%	5.2%	6.8%	8.2%	8.7%	11.7%	11.8%	7.7%

Source: Hagemeyer-Sanchez & Associates.

Port of San Francisco

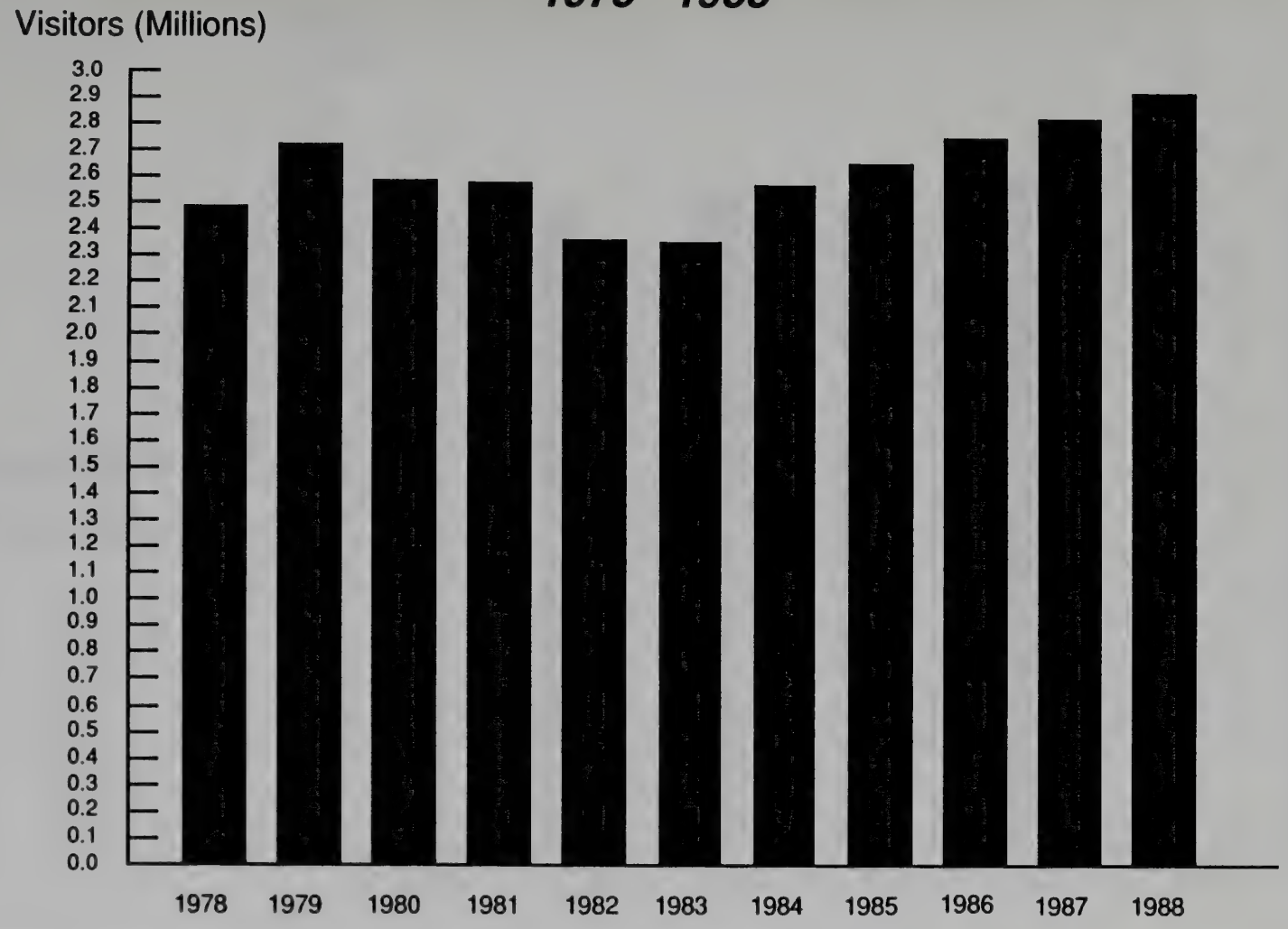
San Francisco Hotel Room Capacity



* Includes rooms available at hotels planned or under construction as of April 1989

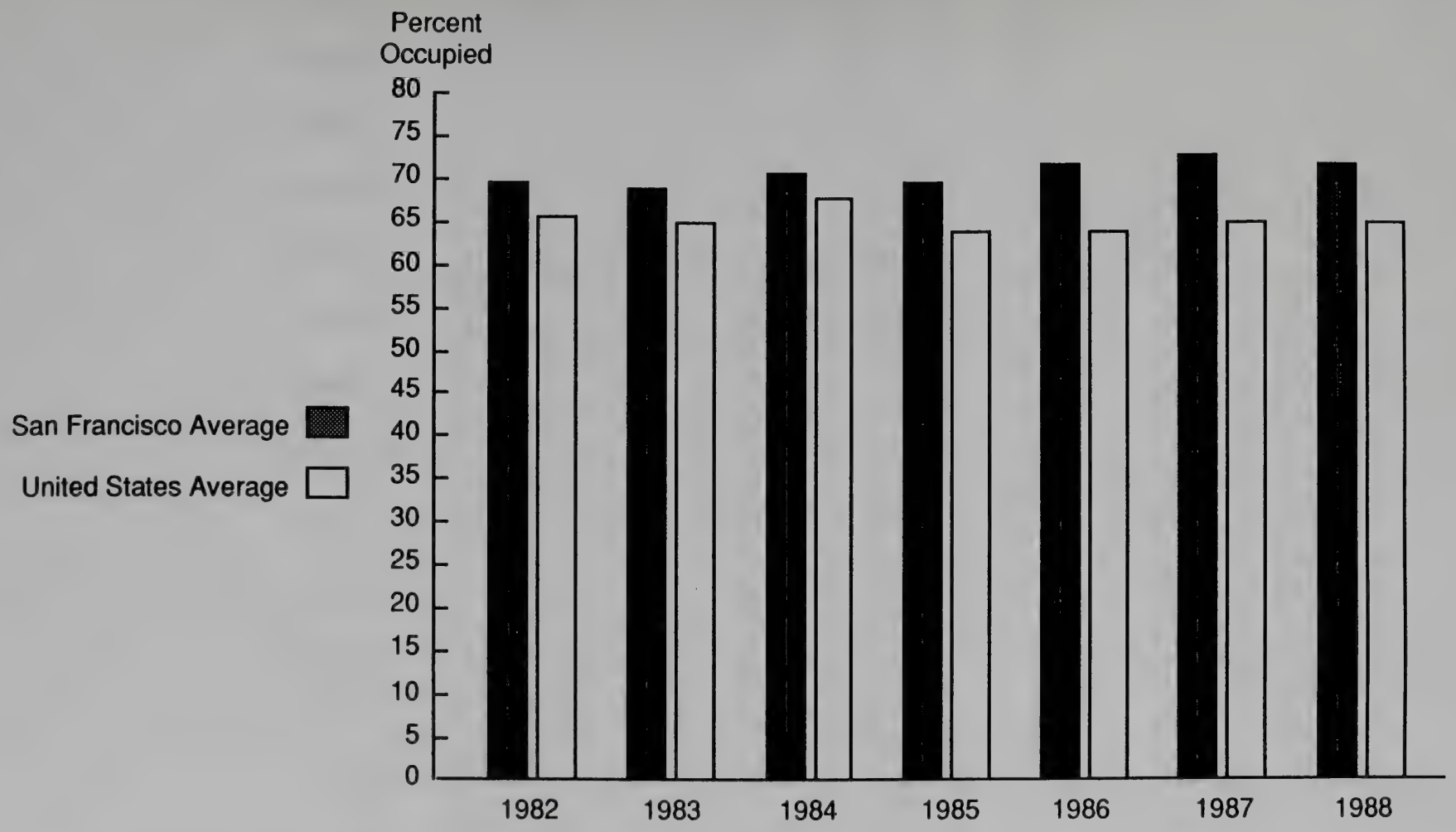
Sources: Pannell Kerr Forster and Laventhol & Horwath.

Port of San Francisco
Total Visitors Staying Overnight in San Francisco Hotels
1978 - 1988



Source: San Francisco Convention & Visitors Bureau utilizing San Francisco Transient Occupancy Tax as a basis.

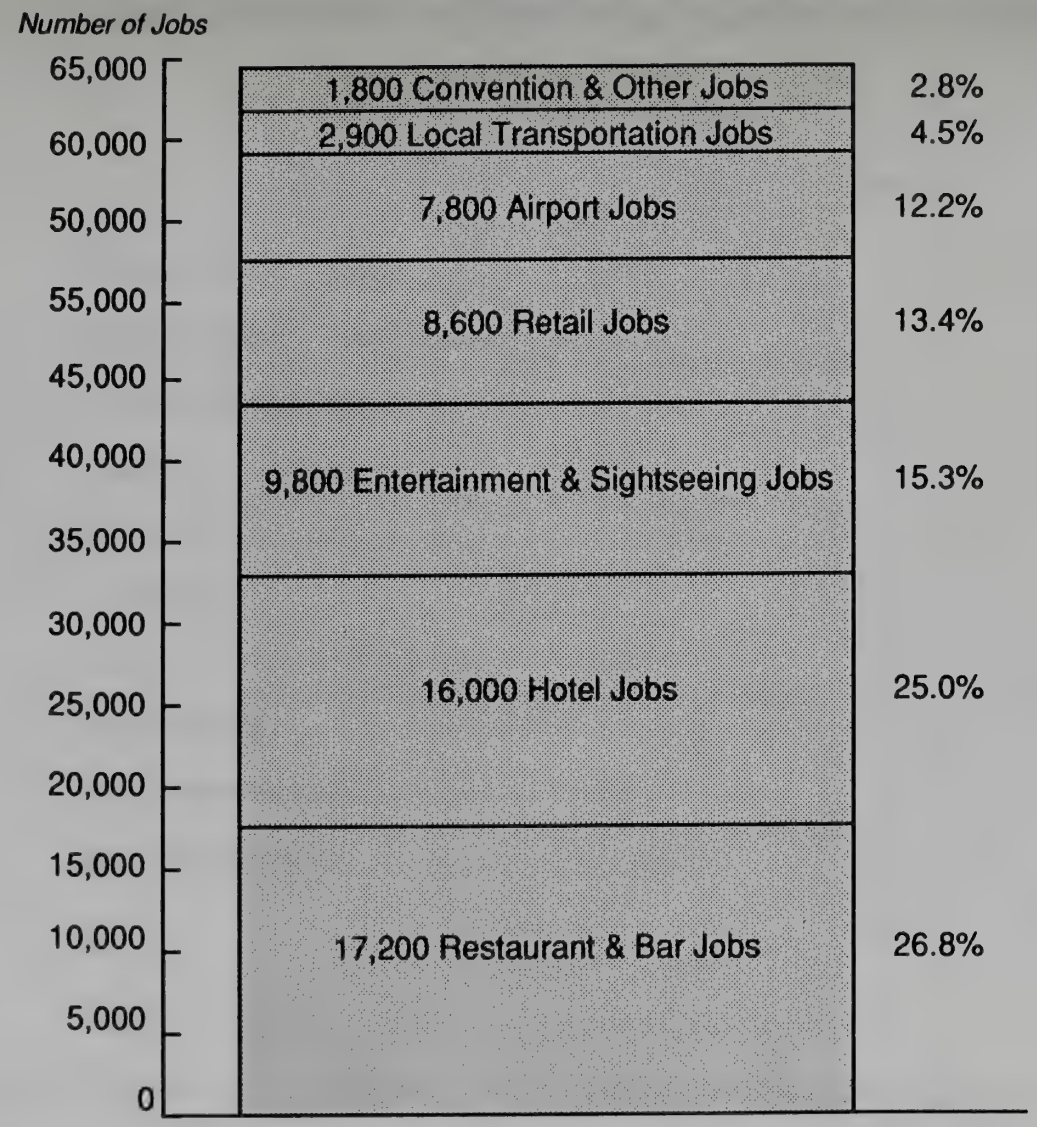
Port of San Francisco
United States and San Francisco Hotel Occupancy Trends



Sources: Pannell Kerr Forster and Laventhol & Horwath

Port of San Francisco

Employment Impact from Visitors to San Francisco



Source: Based on data from Economics Research Associates' 1987 report The Economic and Employment Impacts of Visitors to San Francisco conducted for the San Francisco Planning & Urban Research Association.

Port of San Francisco

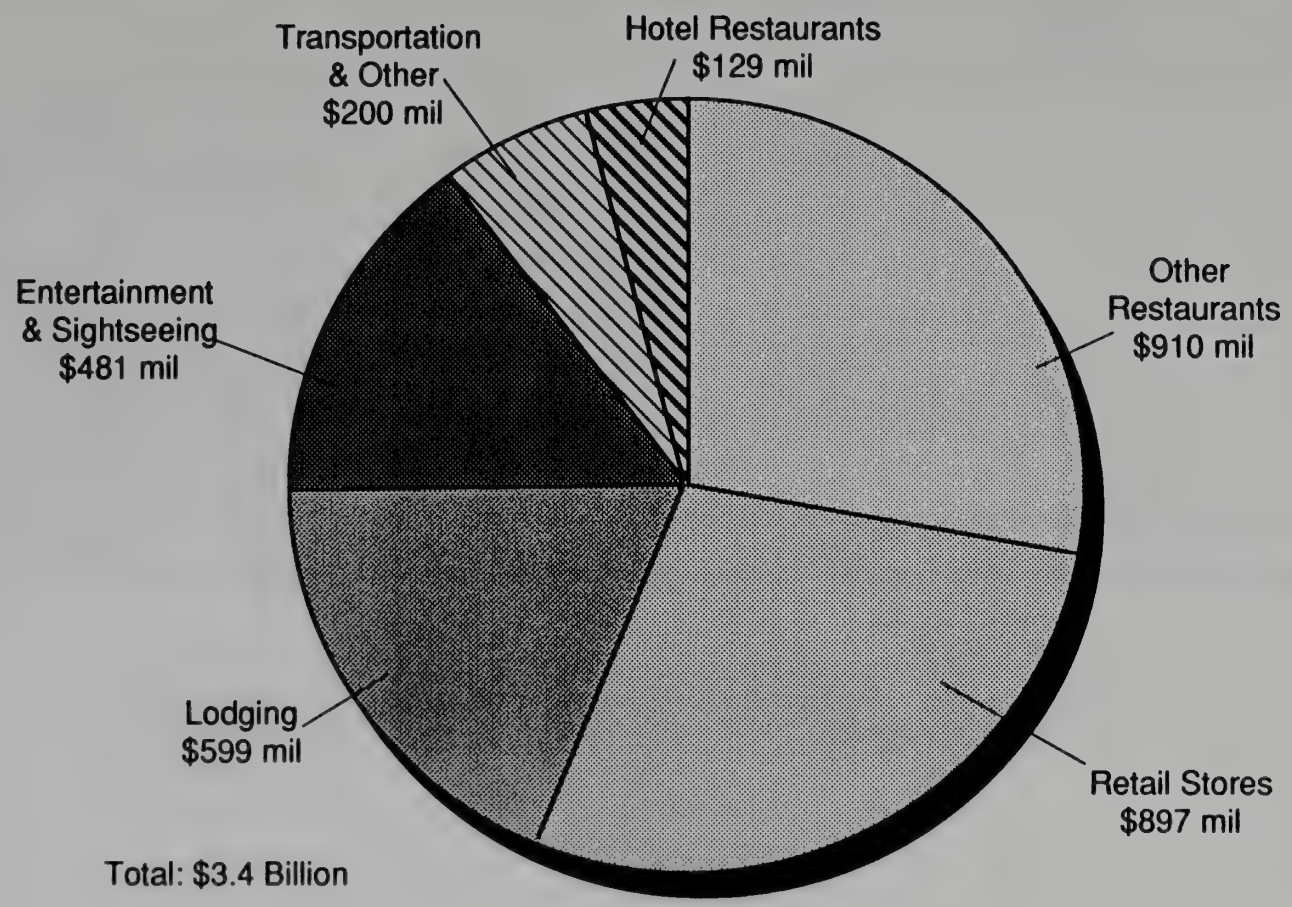
ESTIMATED 1988 SPENDING -
BY SAN FRANCISCO VISITORS STAYING OVERNIGHT IN HOTELS & MOTELS

	Per Cent Of Total Spending	Dollars Spent (Millions)
Hotel/Motel Room Accommodations	37%	$ 580.1
Hotel/Motel Restaurants	7	109.7
Other Restaurants	21	329.3
Retail Stores	17	266.7
Entertainment	6	94.1
Sightseeing	3	47.0
Local Transportation	3	47.0
Car Rental	4	62.7
Car Expenses	1	15.7
Miscellaneous	1	15.7
Total	100%	$1,568.0

Source: San Francisco Convention and Visitors Bureau, The Bureau Book, 1989.

Port of San Francisco

Estimated Flow of Visitor Dollars into the San Francisco Economy



Source: San Francisco Convention & Visitors Bureau, The Bureau Book, 1989.

PORT OF SAN FRANCISCO

Bay Area Housing Potential Supply and Demand
1985-2005

Area	Unconstrained Policy Potential Units	Constrained Policy Potential Units	Projected Household Growth	Constrained Policy Less Growth
San Francisco County	34,300	26,000	26,700	-700
Alameda County	126,700	103,300	120,700	-17,400
Contra Costa County	120,700	112,500	117,000	-4,500
Marin County	25,800	21,700	20,700	1,000
Napa County	17,200	14,600	13,200	1,400
San Mateo County	40,800	37,000	40,700	-3,700
Santa Clara County	125,500	118,400	129,700	-11,300
Solano County	72,100	72,100	71,700	400
Sonoma County	82,800	72,300	69,900	2,400
Regional Total	645,900	577,900	610,300	-32,400

Sources: ABAG Local Policy Survey Development Potential, 1982-1988;
City and county comments on preliminary Projections '90, August 1989.

PORT OF SAN FRANCISCO

Bay Area Housing Needs and Projected Growth
1990-1995

Area	Units of Projected Need	Units of Projected Growth	Unmet Demand
San Francisco County	14,572	7,211	7,361
Alameda County	35,150	29,166	5,984
Contra Costa County	31,763	32,082	-319
Marin County	6,560	4,285	2,275
Napa County	4,047	4,786	-739
San Mateo County	15,347	13,230	2,117
Santa Clara County	48,541	37,672	10,869
Solano County	18,876	21,475	-2,599
Sonoma County	17,667	19,040	-1,373
Regional Total	192,523	168,947	23,576

Sources: ABAG Housing Needs Determinations, January 1989,
ABAG, Projections '90.

Port of San Francisco

BAY AREA RENTAL RATES

Median Advertised Prices For A Two-Bedroom Apartment

Area	Jan. 1989	Jan. 1988
San Francisco	$895	$900
San Mateo County	825	795
Marin County	790	755
San Jose Area	700	650
Oakland Area	625	595
Southern Alameda County	620	690
Contra Costa County	575	550
Sonoma County	555	525
Solano County	450	425

Source: San Francisco Chamber of Commerce, 1989-1990 Bay Area Business Report.

Port of San Francisco

FACT SHEET - PARKING

- The Port currently has 26 parking tenants utilizing approximately 950,000 square feet of property

- The Port currently earns approximately $2.8 million in revenues from land usage for parking (approximately 8% of total Port revenue)

- Meters	$ 827,000
- Stalls	695,000
- Ground Rent	876,000
- Percentage Rent	402,000
Total	$2,800,000

- The Port's current proposed parking expansion plans project a possible $400,000 in additional revenues

- Cresap has estimated a maximum of $1,800,000 in additional revenues to the Port if all land available for parking is developed

- The earthquake of October, 1989, eliminated a significant portion of the Port's available parking space due to the closure of the Embarcadero Freeway

  - These spaces may not be replaced if the Freeway is torn down

Source: Port of San Francisco, 1989.

Port of San Francisco

PROPOSED SITES - INTERIM SURFACE PARKING LOTS

- The following sites have been identified as part of the Port of San Francisco's interim parking plan for surface parking lots:

Site	Current Use	Approximate Size (square feet)
SWL 330	vacant	97,793
SWL 329	vacant	15,106
SWL 327	surface parking	35,138
SWL 348 (part)	vacant	13,434
SWL 324 railroad siding	surface parking	13,500
SWL 323 and railroad siding	surface parking	18,500
SWL 321	surface parking	64,815
Total		258,286

Source: Port of San Francisco

Port of San Francisco

SAN FRANCISCO SHOPPING CENTERS

	Stores	Year Open	Square Feet
Embarcadero Center	175	1968	325,000
Pier 39	146	1978	200,000
Stonestown	66	1952	855,000
Ghirardelli Square	81	1964	170,000
The Anchorage	72	1979	78,000
Galleria at Crocker Center	57	1982	N/A
Japan Center	54	1968	200,000
The Cannery	50	1967	86,000

Source: San Francisco Chamber of Commerce, 1989-1990 Bay Area Business Report.

Port of San Francisco

SAN FRANCISCO RETAIL SALES

Category	1987 Retail Sales (000)	Compound Growth Rate Per Year In Per Cent: 1982-1987
Apparel	$ 470,364	6.39
Women's	205,354	5.01
Men's	105,975	0.91
Family	91,092	20.59
Shoes	67,943	7.52
General Merchandise	629,712	5.96
Variety	12,425	- 0.93
Department	487,160	5.87
Drug	119,739	7.23
Other	10,388	6.00
Specialty	1,040,872	2.63
Gift	132,208	9.90
Sports	53,475	9.93
Florist	28,831	6.82
Photo	25,469	6.61
Music	59,374	6.27
Book/Stationery	116,784	9.15
Jewelry	76,692	7.96
Office	335,979	- 6.72
Other	212,060	13.66
Food & Liquor	353,419	3.77
Food/Liquor	221,070	3.81
Food	70,066	11.17
Liquor	62,283	- 2.05
Cafes/Bar	984,068	5.74
Cafe	221,641	5.67
Cafe: Beer & Wine only	221,382	9.69
Cafe: Bar	541,045	4.37

(Continued)

Port of San Francisco

SAN FRANCISCO RETAIL SALES
(Continued)

Category	1987 Retail Sales (000)	Compound Growth Rate Per Year In Per Cent: 1982-1987
Home	$ 210,678	6.94
Accessories/Furniture	132,798	6.46
Appliance	60,640	10.36
Used	17,240	0.94
Miscellaneous	9,664	16.66
Farm Imp.	5,921	NM
Garden	3,743	- 3.50
Fuel/Ice	NP	NM
Building Materials	193,554	9.28
Lumber	93,991	11.99
Hardware	40,388	5.67
Plumbing/Electrical	34,227	7.23
Paint/Glass/Wallpaper	24,948	9.19
Auto	524,289	2.40
New	270,454	8.86
Used	7,427	-19.80
Parts	32,032	- 0.19
Gas Station	199,827	- 2.46
Trailer/Camper	NP	7.74
Boats/Cycles	14,549	13.39
Retail Total	$4,416,620	4.69

Note: NP/not published by State Board of Equalization.
NM/not meaningful.

Source: San Francisco Chamber of Commerce, 1989-1990 Bay Area Business Report.

Port of San Francisco

STATISTICAL SUMMARY OF OFFICE SPACE - 1988

District	Number Of Buildings	Total Space	% of Total Inventory	Vacant Space	Total Sublet Space	Direct Vacancy
Financial Core						
Class A	56	24,316,824	76%	3,301,529	519,204	11.4%
Class B	42	5,899,607	18	592,462	83,401	8.6
Class C	32	2,008,099	6	226,518	4,453	11.1
Total	130	32,224,530	100%	4,120,473	607,058	10.9%
South Of Market - Financial						
Class A	20	5,515,479	58%	627,618	23,533	11.0%
Class B	11	1,902,878	20	83,276	5,482	4.1
Class C	35	2,110,280	22	321,640	37,412	13.5
Total	66	9,528,637	100%	1,032,534	66,427	10.1%
Total - Financial District						
Class A	76	29,832,303	71%	3,929,147	542,737	11.4%
Class B	53	7,802,485	19	675,702	88,883	7.5
Class C	67	4,118,379	10	548,158	41,865	12.3
Total	196	41,753,167	100%	5,153,007	673,485	10.7%
South Beach						
Class A	3	317,774	55%	13,045	9,611	1.1%
Class B	6	264,500	45	60,704	16,691	18.9
Class C	0	0	0	0	0	0.0
Total	9	582,274	100%	79,749	26,302	9.2
North Waterfront						
Class A	9	1,104,000	31%	57,650	4,686	4.8%
Class B	37	2,106,645	59	111,979	1,074	5.3
Class C	4	369,618	10	17,960	9,960	2.2
Total	54	3,580,263	100%	187,589	15,720	4.8%
Yerba Buena						
Class A	8	1,431,593	62%	153,168	9,477	10.0%
Class B	7	588,493	26	17,820	0	3.0
Class C	10	273,386	12	4,447	0	1.6
Total	25	2,293,472	100%	175,435	9,477	7.2%

Note: Survey does not include projects under construction or planned. Survey does include sublease space. However, total sublet space is itemized in vacancy summary. Total inventory includes San Francisco office buildings, all classes containing 20,000 square feet or more of net rentable office space in the Financial District and 10,000 square feet or more of net rentable office space in the outlying areas whose primary function is office use. Statistical Summary of Office Space as of December 31, 1988.

Source: San Francisco Chamber of Commerce, 1989-1990 Bay Area Business Report.

PORT OF SAN FRANCISCO

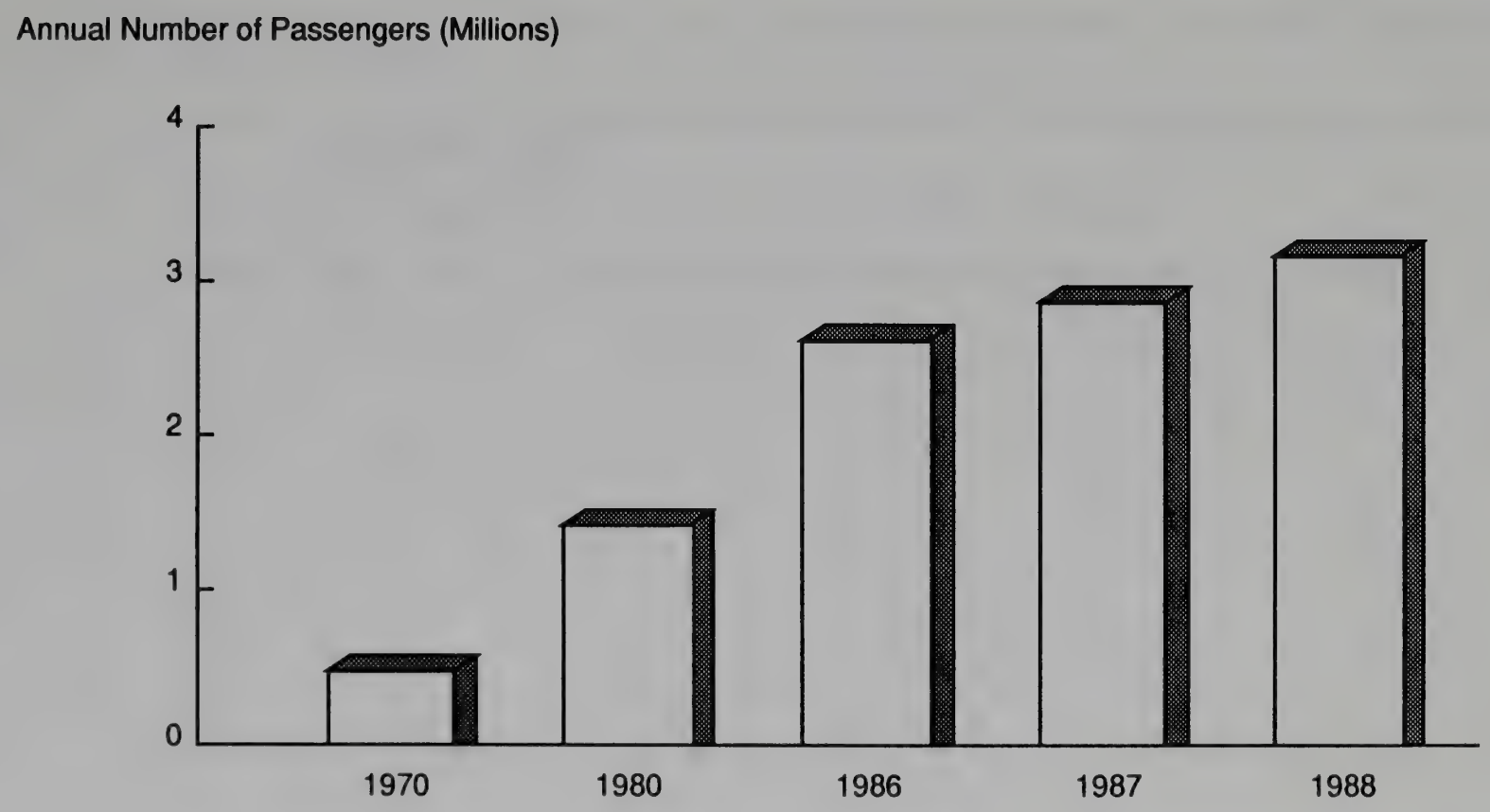
San Francisco Central Business District Office Space Characteristics

Year	New Construction (Million sq. ft.)	Net Absorption (Million sq. ft.)	Vacancy	Gross Effective Rents (a)
1980	0.86	1.90	0.4%	$25
1981	1.87	2.10	0.1%	$36
1982	2.20	1.70	0.3%	$38
1983	4.20	1.80	5.9%	$36
1984	1.30	0.45	7.0%	$33
1985	0.50	0.50	11.8%	$32
1986	2.80	1.10	16.5%	$26
1987	1.70	1.60	15.5%	$26
1988(e)	1.70	1.30-1.50	13.5%	$27
1989(p)	0.80	1.30-1.50	12.0%	$28

(a) Typical Financial District core lease rate, Class A space
(e) Estimate
(p) Projection

Source: San Francisco Chamber of Commerce
1989-1990 Bay Area Business Report.

Port Of San Francisco
North American Cruise Market
(3 Days or More Market)



Source: Cruise Lines International Association, The Cruise Industry: An Overview, July 1989

Port of San Francisco

SAN FRANCISCO AS A CRUISE DESTINATION

- San Francisco's best opportunity(s) for increasing passenger ship calls were ranked as follows:

  66.7% - As a port of call for ships enroute elsewhere, including repositioning cruises

  52.4% - As a port of embarkation/debarkation for cruises to foreign destinations, including Alaska

  38.1% - As a permanent call on a Western USA itinerary

  28.6% - As a port of embarkation/debarkation for Cruises to Nowhere.

Source: Port of San Francisco, Market Identification Of Cruise Industry Opportunities, June 1988.

Port of San Francisco

SAN FRANCISCO AS A PORT OF EMBARKATION/DEBARKATION

- With regards to the feasibility of using San Francisco as a port of embarkation/ disembarkation, the lines answered:

- Alaska	66.7% Yes	33.3% No
- Orient	62.9% Yes	38.1% No
- Mexico	47.6% Yes	53.4% No

- The logistical advantages of using San Francisco as port of embarkation/ disembarkation were noted as:

- Mentioned 12 times:	Major Air Gateway
- Mentioned 7 times:	Favorable Pre/Post Destination
- Mentioned 4 times:	"No logistical advantage"
- Mentioned 2 times:	Good Ship Provisioning, Active Waterfront
- Mentioned 1 time:	Good "meet and greet," Good Ground Transportation

- The logistical disadvantages of using San Francisco as port of embarkation/ disembarkation were noted as:

- Mentioned 12 times:	Geographic locastion
- Mentioned 2 times:	"No logistical disadvantage, High Airfares/Long Distances
- Mentioned 1 time:	Getting from Airport to Ship
	Comparative size of LA market
	Appearance of Port Terminal
	Inefficiency of Stevedoring
	Unattractiveness of California cruise

Source: Port Of San Francisco, Market Identification Of Cruise Industry Opportunities, June 1988.

Port of San Francisco

SAN FRANCISCO AS A PORT OF CALL

- With regards to San Francisco as a Port of Call, 100% agreed that the city is well-prepared to handle the needs and wants of passengers, and 90.5% felt San Francisco would be enjoyable as an overnight (2 day) port of call.

- When questioned why ships might elect to bypass San Francisco in lieu of another West Coast port on their repositioning cruise, the following reasons were mentioned:

  - Mentioned 9 times: Scheduling time constraints
  - Mentioned 4 times: Larger base market in LA
  - Mentioned 3 times: To keep cruise costs down
  - Mentioned 2 times: Passengers anxious to get off ship
  - Mentioned 1 time: SF market does not buy repositioning cruises. Nicer facilities elsewhere.

- When asked what might entice a cruise line to call at San Francisco over another West Coast port, the following suggestions were made:

  - Mentioned 7 times: The lure/attractiveness of SF
  - Mentioned 5 times: Revenue support/lower port costs
  - Mentioned 3 times: Lower docking fees; marketing efforts by Port
  - Mentioned 2 times: Development of Northern California market, relatively higher income of SF market
  - Mentioned 1 time: To show ship to travel agents, improve Stevedoring

Source: Port Of San Francisco, Market Identification Of Cruise Industry Opportunities, June 1988.

Port of San Francisco

SAN FRANCISCO MARKETING/SERVICE EFFORTS

- When asked what San Francisco can do to attract more cruise visits and support the industry in general there were five basic responses:
  - Mentioned 9 times: Enhance visibility by marketing
  - Mentioned 4 times: Create a cost differential or price incentive
  - Mentioned 3 times: Improve the cruise terminal
  - Mentioned 1 time: Improve the stevedoring, change the Jones Act
- When asked what it would take to entice their particular company to call at San Francisco the lines were altogether less committal and proffered general responses:
  - Mentioned 4 times: Market and work with lines, cost incentives: lower fees
  - Mentioned 2 times: Give lines promotional help, improve cruise facility
  - Mentioned 1 time: Change Jones Act, improve pax handling at Port, research neighboring ports, target travel agents and pax.

Source: Port Of San Francisco, Market Identification Of Cruise Industry Opportunities, June 1988.

Port of San Francisco

NUMBER OF VESSEL CALLS AND PASSENGERS

	80/81	81/82	82/83	83/84	84/85	85/86	86/87	87/88
Vessel Calls	50	72	98	117	121	133	111	83
Number of Passengers	43,000	48,000	57,000	83,000	93,000	102,000	73,000	45,000

Source: Port of San Francisco Cruise Industry Task Force, Cruise Industry Marketing Plan, December 1988.

Port of San Francisco

NORTH AMERICAN MARKET - GROWTH BY LENGTH OF CRUISE

Passengers:

	Passengers		% Growth
	1980	1988	1988 vs. 1980
3 - 5 Days	347,344	1,041,286	+200.0%
6 - 8 Days	846,187	1,741,004	+105.8
9 - 17 Days	221,024	380,606	+ 72.2
18+ Days	16,023	11,739	- 26.8
Total	1,430,578	3,174,635	+121.1%

Share:

	Absolute		% Point Change
	1980	1988	1988 vs. 1980
3 - 5 Days	24.3	32.8	+8.5%
6 - 8 Days	59.1	54.8	-4.3
9 - 17 Days	15.4	12.0	-3.4
18+ Days	1.2	0.4	-0.8
Total	100.0	100.0	+0.0%

Source: Cruise Lines International Association, The Cruise Industry: An Overview, July 1989.

Port of San Francisco

NORTH AMERICAN PORT EMBARKATION

	Total Embarkations - 1988 vs. 1982		
	1982	1988	% Change
San Francisco	25,982	18,352	- 29.4
Boston	0	13,724	-
Galveston	3,050	0	-
Los Angeles	119,012	259,414	+ 18.0
Miami	926,800	1,314,597	+ 41.8
New Orleans	10,000	19,321	+ 93.2
New York	168,025	199,356	- 18.7
Palm Beach	10,000	119,861	+1098.6
Port Canaveral	92,920	330,138	+ 255.3
Port Everglades	74,582	814,264	+1028.0
San Diego	7,400	61,511	+ 731.2
San Juan	61,611	100,000	+ 62.3
Seattle	2,312	11,220	+ 385.3
Tampa	26,354	111,833	+ 324.4
Vancouver	65,868	152,187	+ 131.1
Total	1,593,916	3,552,778	123.0%

Source: Annual Embarkation Reports submitted by the Port Authority of the cities.

Port of San Francisco

NORTH AMERICAN PORT EMBARKATION

	Total Embarkations - 1988 vs. 1987		
	1987	1988	% Change
San Francisco	28,646	18,352	- 35.9%
Boston	14,808*	13,724*	- 7.3
Galveston	2,252	0	-
Los Angeles	202,402	259,414	+ 28.2
Miami	1,249,620*	1,314,597*	+ 5.2
New Orleans	19,499	19,321	- 0.9
New York	200,000	199,256	- 0.3
Palm Beach	112,327*	199,861*	+ 6.7
Port Canaveral	362,132*	330,138*	- 8.8
Port Everglades	539,561*	814,264*	+ 55.9
San Diego	25,052	61,511	+145.5
San Juan	91,569	100,000	+ 9.2
Seattle	10,675	11,220	+ 5.1
Tampa	274,384*	111,833*	- 59.2
Vancouver	147,230	152,187	+ 3.4
Total	3,280,157	3,552,778	+ 8.3%

*These figures include one-day cruise passengers.
Source: Annual Embarkation Reports submitted by the Port Authority of the cities.

Port of San Francisco

NORTH AMERICAN PORT EMBARKATION DEEP WATER (3+ DAY CRUISES) SHARES

	Embarkation			
	Total 1988 Passengers	One-Day Cruise Passengers	Net 3+ Day Passengers (Deep Water)	% Total North American (Deep Water)
San Francisco	18,352	0	18,352	0.7%
Boston	13,724	6,946	6,778	0.3
Los Angeles	259,414	0	259,414	9.8
Miami	1,314,597	188,484	1,126,113	43.0
New Orleans	19,321	0	19,321	0.7
New York	199,356	0	199,356	7.5
Palm Beach	119,861	0	119,861	4.5
Port Canaveral	330,138	114,440	215,698	8.2
Port Everglades	814,264	553,944	260,320	9.9
San Diego	61,511	45,019	16,492	0.6
San Juan	100,000	0	100,000	3.8
Seattle	11,220	0	11,220	0.4
Tampa	111,833	0	111,833	4.2
Vancouver	152,187	0	152,187	5.8
Total	3,525,778	908,833	2,616,945	100.0%

Source: Annual Embarkation Reports submitted by the Port Authority of the cities.

Port of San Francisco

SAN FRANCISCO AS PART OF A WEST COAST ITINERARY

- When asked whether a West Cost itinerary could be successful:

  - 66.7% Yes
  - 33.3% No

- Many obstacles were mentioned though, most notably:

  - Rough seas
  - Cool weather
  - Short season
  - Lack of interesting ports.

- On the positive side, there was much interest in developing cruises to transport passengers along the cost that would include a combination of stops at:

  - San Diego
  - Los Angeles
  - Santa Barbara
  - San Simeon
  - Solvang
  - Carmel/Monterey
  - Bodega Bay
  - Mendocino Coast
  - Colombia River/Portland
  - Seattle
  - Vancouver
  - Victoria.

- When asked whether a Cruise/Car Ferry along the West Coast could find a niche:

  - 38.1% Yes
  - 61.9% No

Source: Port Of San Francisco, Market Identification Of Cruise Industry Opportunities, June 1988.

FACILITIES CONDITION SURVEY

Port of San Francisco

Facilities Condition Survey

INTRODUCTION

This appendix provides a qualitative assessment of the condition of the Port of San Francisco piers, sheds, and seawall along the 7.5-mile waterfront between Aquatic Park on the north and India Basin on the south. Earl and Wright conducted this work as subcontractors to Cresap. Their findings are reflected in the Strategic Planning Study for the Port of San Francisco.

TERMINOLOGY

Structures on the Port of San Francisco waterfront were constructed over the past 100 years. Their age range is reflected in the types of construction and construction materials found, including timber, steel, and concrete. The term pier, as used in this appendix, refers to a marine structure for mooring or tying up vessels, loading and unloading cargo, or embarking or disembarking passengers. Piers, as used herein, consist of docks that project out into the water perpendicular to the shoreline, and docks that parallel the shore.

Piers typically consist of a deck structure supported on piles. Separate from the structural deck, but important for operation of the facility, is the wearing surface on the deck. Fender systems are provided at the pier perimeters for protection during berthing. Fenders absorb most of the energy from berthing impacts and are therefore typically in poorer condition than the piers and require regular maintenance.

Sheds are structures located on the piers; they have large gross areas for receiving and shipping cargo. Sheds vary in type of construction from wood to concrete and steel framing.

The seawall is the vertical wall at the land/water interface that forms the landside boundary of the waterfront. Its construction varies depending on age and type of subsurface condition. The seawall structures are subjected to superimposed loads on the land side, and to water pressure, corrosion, and erosion on the water side. As a result, the seawall requires surveillance and regular maintenance.

SUMMARY FINDINGS

A survey of Port of San Francisco piers, sheds, and seawall from Aquatic Park to India Basin was conducted to address the physical condition of these assets. The survey consisted of several interviews with Port personnel, and this report is based on information they provided.

Piers and fenders were evaluated separately to clearly indicate the pier structural condition while providing valuable information regarding fender condition. Facilities were rated in four categories: Good, Fair, Poor, and Condemned. Overall pier condition was concluded to be as follows:

PIER CONDITION	NUMBER OF PIERS	PERCENT OF TOTAL
Good	22	47
Fair	13	28
Poor	9	19
Condemned	3	6
Totals	47	100%

Fender condition for these piers (excluding Pier 39, which has no fender system) was concluded to be as follows:

FENDER CONDITION	NUMBER OF PIERS	PERCENT OF TOTAL
Good	11	24
Fair	13	28
Poor	19	41
Condemned	3	7
Totals	46	100%

Most sheds are in good condition. These structures are typically old, and their appearance reflects their age. However, with a few exceptions, these structures remain usable, and, with regular maintenance, can remain operational for some time. Overall shed condition was concluded to be as follows:

SHED CONDITION	NUMBER OF SHEDS	PERCENT OF TOTAL
Good	29	83
Fair	4	11
Poor	1	3
Condemned	1	3
Totals	35	100%

Seawall construction around the Port also varies in age from old to relatively new. Repairs are made as required. The seawall is in Fair condition except for the section between Piers 41 and 45, which is in Poor condition.

Data Compilation

Survey results (entitled Summary Survey Sheets 1 through 6, dated 4/27/76) from inspections made between 1958 and 1976 for all odd-numbered piers and for even piers through Pier 64 are available at the Port offices. Information on these sheets, although not always complete, includes type of pier construction, date of construction, condition, and allowable loading. These sheets were used as reference during interviews and were updated to form the basis for determining each structure's assessed condition for this report. The U.S. Army Corps of Engineers - Port Series No 30 publication was also used to provide reference information regarding type of construction and physical dimensions.

For this survey, Condition Assessment Sheets were compiled for all piers and sheds by the Port Maintenance Department staff. These sheets were completed by Port staff members who are familiar with the present condition of particular structures. Their portion of the work was done without direct involvement of Earl and Wright. Knowledge of the facilities is based on responsibility for maintenance work on the structures and, in some cases, on a recent survey of Port facilities following the October 17, 1989, earthquake. The Condition Assessment Sheets were reviewed with the Port Engineering Department and modified as necessary.

Information on the Condition Assessment Sheets includes condition of bearing piles, fender piles, deck slab, and deck framing. Complete information was not always available; for example, some piers did not have assessments for a particular element such as piles. In such cases, required estimates of condition were based on discussions with various Port personnel. This approach may allow for some inaccuracy regarding individual structure components, but does provide a reasonable overall assessment of the waterfront facilities.

Facility Evaluations

Facilities were evaluated and assigned one of four categories depending on their structural condition: Good, Fair, Poor, or Condemned. The assessments, although subjective, were based on an estimate of the physical condition of the element under consideration. For example, overall pier evaluation was based on an assessment of three pier components: piles, substructure framing (pile caps, deck beams, and stringers), and structure deck. An Excellent category was not used because this evaluation process was not considered sufficiently in-depth and was too subjective to warrant the rating an Excellent category would imply.

Some structures or components of structures were rated between two levels. For simplicity, and to account for the potential inaccuracies of the rating procedure, structures with ratings between two levels were arbitrarily assigned a rating above or below the inbetween level for tabulations of overall condition. Typically, where more than one structure was given a rating between two levels, the structure ratings were divided between the next upper and lower levels. This procedure should provide a reasonable global representation of the condition of the Port facilities.

The four condition categories used in this appendix are defined as follows:

CONDITION RATING	DESCRIPTION
Good	Limited deterioration which, with minor repair, could be maintained at the present rating and would remain fully operational.
Fair	Some deterioration which, with repair work, could be maintained at the present rating or potentially brought up to a Good rating. Structures rated Fair may have portions considered Good and some minor elements with a Poor rating.
Poor	Significant deterioration which, if left unattended, could result in the structure becoming unusable and potentially condemned in the future.
Condemned	Structures designated as Condemned by the Port. These structures are unsafe and not in use.

CONDITION OF PORT FACILITIES

Physical condition assessments were made for piers, fenders, sheds, and seawalls. Assessments were first made based on the structure's current condition and therefore included damage due to the Loma Prieta earthquake of October 17, 1989. Subsequent to these assessments, modifications to the ratings were made for those structures whose earthquake damage is expected to be repaired. The structures to have earthquake damage repairs were identified in the "Damage Survey Report" dated December 20, 1989, prepared by the Port to request Federal Emergency Management Association (FEMA) funding.

Figure 1, at the end of this appendix, is a map of the Port of San Francisco showing the area of this study. Piers and sheds are shown on this map.

Piers

Pier evaluations were based on the condition of three pier components: piles, deck framing, and deck. These components were evaluated separately to develop a composite rating for the pier. Wearing surfaces placed on the structural deck, such as asphalt, were not included in the survey evaluation.

Fender condition was not included in the pier evaluations. Fenders were evaluated separately to clearly identify the condition of the piers, as well as to provide specific information regarding the fenders.

All piers were evaluated except Pier 7, Pier 64, and one pier at the Southwest Marine ship repair facility. Neither of the latter two piers has been used for some time, and both are in a state of disintegration. Pier 7 is a new public access and fishing pier currently under construction and thus was not included in this survey.

Piers within the Port cover a wide spectrum of types of construction and have been constructed over a period of approximately 90 years. The oldest and the most recent major pier construction at the Port is in one location, the Ferry Building and Plaza area. The Ferry Building piles and deck were constructed in 1895, and the plaza area was constructed in 1972 to accommodate the BART air intake structure and the Marin ferry system.

Pile types include protected (jacketed or wrapped) and unprotected timber piles, concrete piles, and steel piles. Deck framing includes timber, concrete, and steel. Decks are constructed of timber and concrete.

No direct correlation was obtained between pier age and present condition. This is attributed to the maintenance program on the piers. Waterfront structures require regular maintenance, and with adequate regular maintenance, they can remain operational for many years. Pier condition is summarized as follows:

PIER CONDITION	NUMBER OF PIERS	PERCENT OF TOTAL
Good	22	47
Fair	13	28
Poor	9	19
Condemned	3	6
Total	47	100%

Pier condition ratings are shown in Exhibit 1 by pier, and in Exhibit 2 by pier condition. The condition assessment of each pier is shown on Figure 1. Some individual piers are presented as one structural unit and given a combined rating. These combined piers are Fisherman's Wharf-East Mooring Basin and Fisherman's Wharf-West Mooring Basin.

Piers 27 and 29 and the Ferry Building/Ferry Plaza area have all been rated as Good subject to earthquake damage repair. Pier 36 is expected to undergo repair in the near future and was therefore rated in Good condition.

On the basis of discussions with the Golden Gate National Recreation Area, the Hyde Street Pier suffered significant earthquake damage that was not identified in the FEMA funding request. Adjustments to the Hyde Street Pier evaluation were considered, but none were required since the Pier was in Poor condition prior to the earthquake.

Fenders

The condition of fenders was evaluated separately to allow a clear indication of each pier's condition as distinct from its fender, and also to provide specific information regarding the fenders because of their importance to the Port's ability to berth vessels. The Port maintains more than 60,000 lineal feet of fendering. This fendering consists primarily of timber piles, either sheathed or unsheathed, with a few rubber cushion fenders. The fender condition at each pier is provided in Exhibit 3 and shown on Figure 1. The fender condition is independent of the pier condition, and the overall fender condition rating is generally lower than the overall pier condition. The fender condition (excluding Pier 39, which has no fenders) is as follows:

FENDER CONDITION	NUMBER OF PIERS	PERCENT OF TOTAL
Good	11	24
Fair	13	28
Poor	19	41
Condemned	3	7
Totals	46	100%

On the basis of linear footage, the overall condition of the fender systems is as follows:

FENDER CONDITION	PERCENT OF TOTAL LENGTH
Good	23
Fair	33
Poor	37
Condemned	7
Totals	100%

The fender systems on Piers 80 and 94 are in Fair condition. However, fender construction work is currently under way which, when completed, will change the fender rating to a Good. The condition of these fenders was thus rated as Good in this survey.

Sheds

The physical condition of 35 separate sheds was assessed. Office buildings such as the Ferry Building, Agriculture Building, Fireboat House, and miscellaneous small structures were not included in this survey. These 35 sheds contain a gross floor area of approximately 2.7 million square feet. Nearly all sheds were assessed to be in Good condition. The few exceptions included the sheds on Piers 31, 36, and 50 (2 of 4 sheds), which were assessed to be in Fair condition. The shed on Pier 92 was assessed to be in Poor condition, and the shed on condemned Pier 24 was given a Condemned rating. Shed condition assessments are in Exhibit 4.

Overall shed condition is as follows:

SHED CONDITION	NUMBER OF SHEDS	PERCENT OF TOTAL
Good	29	83
Fair	4	11
Poor	1	3
Condemned	1	3
Totals	35	100%

The sheds are typically old, and their appearance reflects their age. Significant exterior weathering has occurred. The condition assessment reflects the condition of the main structural members and does not represent the condition of the architectural elements such as siding or roofing, or structural adequacy of the buildings to meet various loading conditions such as seismic excitation.

Seawall

The seawall along the Port varies in age from old to new. Type of construction varies from horizontal logs supported by timber piling to concrete exposed-steel sheet pile walls. In general, the seawall is considered to be in Fair condition, except for the section of wall from the east side of Pier 45 to the west side of Pier 41, whose condition is Poor. Repairs are made as necessary to maintain the seawall in adequate condition.

Port of San Francisco

Pier Condition By Location

North		South	
Pier	Condition	Pier	Condition
Hyde Street	Poor	22-1/2	Good
Fisherman's Wharf-East	Good	24	Condemned
47	Poor	26	Good
Fisherman's Wharf-West	Good	28	Fair
45	Good*	30	Fair***
43-1/2	Fair	32	Fair***
43	Poor	34	Condemned
39	Good	36	Good**
35	Good	38	Fair
33	Good	40	Poor
31	Good	46B	Good
29	Good*	48	Good
27	Good*	50	Good
23	Good	54	Fair
19	Good	Southwest Marine Ship Repair Facility 1	Poor
17	Fair	Southwest Marine Ship Repair Facility 3	Fair
15	Fair	Southwest Marine Ship Repair Facility 4	Fair
9	Poor	Southwest Marine Ship Repair Facility 5	Condemned
7-1/2	Poor	70	Fair
3	Good	80	Good
1	Good	84	Poor
Ferry Building/Ferry Plaza	Good (1)	90	Fair
		92	Poor
		94	Good
		96	Good

* After earthquake repair.
** After planned construction.
*** The pier structure between Piers 30 and 32 is rated Good.

Port of San Francisco

Pier Condition By Rating Category

Good	Fair	Poor	Condemned
Fisherman's Wharf-West	43-1/2	Hyde Street	24
Fisherman's Wharf-East	17	47	34
45*	15	43	Southwest Marine Ship Repair Facility 5
39	3	9	
35	28	7-1/2	
33	30***	40	
31	32***	Southwest Marine Ship Repair Facility 1	
29*	38	84	
27*	54	92	
23	Southwest Marine Ship Repair Facility 3		
19	Southwest Marine Ship Repair Facility 4		
1	70		
Ferry Building/Ferry Ferry Plaza	90		
22-1/2			
26			
36**			
46B			
48			
50			
80			
94			
96			
Totals:			
22 Piers	13 Piers	9 Piers	3 Piers

* Condition after earthquake repair.
** Condition after planned construction.
*** The pier structure between Piers 30 and 32 is rated Good.

Port of San Francisco

Fender Condition By Rating Category

Good	Good-Fair	Fair	Fair-Poor	Poor	Condemned
Fisherman's Wharf-West	48	47	33	Hyde Street	24
Fisherman's Wharf-East		45	23	43-1/2	34
29		35	9	43	Southwest Marine Ship Repair Facility 5
27		19	36	31	
Ferry Building/ Ferry Plaza		54	38	17	
22-1/2		Southwest Marine Ship Repair Facility 3	50	15	
80*		Southwest Marine Ship Repair Facility 4	90	7-1/2	
84		70		3	
92				1	
94*				26	
96				28	
				30	
				32	
				40	
				46B	
				Southwest Marine Ship Repair Facility 1	
Totals:					
11 Piers	1 Pier	8 Piers	7 Piers	16 Piers	3 Piers

*Fender construction is in progress or expected to begin in the near future. Condition rating is based on completed structure.

Port of San Francisco

Shed Condition By Rating Category

Good	Fair	Poor	Condemned
45 (4)	31	92	24
35	36		
33	50 (2)		
29			
27			
23			
19			
17			
15			
9			
3			
26			
28			
38			
40			
46B			
48 (2)			
50 (2)			
54			
80 (4)			
96			
Totals:			
29 Sheds	4 Sheds	1 Shed	1 Shed

OTHER

Port of San Francisco

LIST OF STAKEHOLDERS

1. Ferry/excursion vessel operators
   - 1.1 Large operators
   - 1.2 Small operators
   - 1.3 Caltrans

2. Fishing Industry
   - 2.1 Fishermen
   - 2.2 Brokers
   - 2.3 Processors
   - 2.4 California Seafood Institute

3. Ship Repair Industry
   - 3.1 Ship repair tenants
   - 3.2 Potential ship repair tenants
   - 3.3 Golden Gate Ship Repair Association
   - 3.4 U.S. military

4. Cruise Ship Industry
   - 4.1 Current "S.F." lines
   - 4.2 Potential "S.F." lines
   - 4.3 California Stevedore and Ballast Company
   - 4.4 Cruise Ship Advisory Group

5. Marine Cargo Industry
   - 5.1 Terminal operators
   - 5.2 Railroads
   - 5.3 Current shippers
   - 5.4 Potential shippers
   - 5.5 Custom brokers
   - 5.6 Freight forwarders
   - 5.7 Port of Oakland

6. Organized Labor
   - 6.1 ILWW
   - 6.2 Sailor Union of Pacific
   - 6.3 Local 2 (restaurants)
   - 6.4 IBU
   - 6.5 SF Labor Council
   - 6.6 Marine Engineers Benevolent Association
   - 6.7 Local 3 - Operating Engineers
   - 6.8 Transport Workers
   - 6.9 Building Trades
   - 6.10 MFOW
   - 6.11 International Association of Machinists
   - 6.12 MMOP

7. Northern Waterfront Groups
   - 7.1 Telegraph Hill Dwellers
   - 7.2 North Beach Neighbors
   - 7.3 Russian Hill Association
   - 7.4 North Point Center Apartments
   - 7.5 FWCAC

8. Southern Waterfront Groups
   - 8.1 Potrero Hill Boosters
   - 8.2 Bayside Village Apartments
   - 8.3 South Beach CAC
   - 8.4 Mission Creek Harbor Association

9. Environmental Groups
   - 9.1 Save the Bay
   - 9.2 Citizens for Better Environment
   - 9.3 San Francisco Tomorrow
   - 9.4 Sierra Club
   - 9.5 Dolphin Club
   - 9.6 Southern Rowing Club
   - 9.7 Mission Creek Conservancy

Continued

Port of San Francisco

LIST OF STAKEHOLDERS
(Continued)

10. Retail/Commercial Tenants
    - 10.1 Pier 39 Association
    - 10.2 Waterfront Restaurants
    - 10.3 Fisherman's Wharf Merchant's Association
    - 10.4 Port Tenants Association
    - 10.5 Potential Tenants
    - 10.6 Anchorage Shopping Center
    - 10.7 Existing Tenants

11. Regulators
    - 11.1 BCDC
    - 11.2 State Lands Commission
    - 11.3 U.S. Army Corps of Engineers
    - 11.4 MTC
    - 11.5 Regional Water Quality Control Board
    - 11.6 California Dept. of Fish & Game
    - 11.7 Air Resources Board
    - 11.8 U.S. Fish & Wildlife Service
    - 11.9 National Marine Fisheries

12. City and County of S.F.
    - 12.1 Board of Supervisors
    - 12.2 Mayor
    - 12.3 Planning Department
    - 12.4 Visitors and Convention Bureau
    - 12.5 Redevelopment Agency
    - 12.6 S.F. Airport

13. Civic organizations
    - 13.1 SPUR
    - 13.2 Chamber of Commerce
    - 13.3 Bay Vision 2020 (Heyman) Commission
    - 13.4 San Franciscans Seeking Consensus
    - 13.5 S.F. 2000

14. S.F. Port
    - 14.1 Port Commission
    - 14.2 Port employees
    - 14.3 Strategic Planning Adv. Panel

15. General Public
    - 15.1 S.F. taxpayers/residents
    - 15.2 Regional residents (non-S.F.)
    - 15.3 S.F. employees (non-S.F. residents)
    - 15.4 Tourists

16. Media

17. National Port Community

18. Potential Developers

San Francisco Port Commission

STATEMENT OF REVENUES AND EXPENDITURES
REVENUE AND EXPENDITURE SUMMARY
FOR THE PERIOD ENDED JUNE 30, 1989
(Final)

	Current Month		Year To Date	
Revenue	Budget	Actual	Budget	Actual
Maritime	$ 907,250	$1,197,336	$10,887,000	$10,636,114
Property	1,590,000	1,518,780	19,080,000	18,649,190
Maintenance	8,333	85,432	100,000	108,932
Engineering	0	0	0	0
Finance & Administration	344,417	414,741	4,133,000	5,176,592
Total Revenue	$2,850,000	$3,216,289	$34,200,000	$34,570,828
Carryover	93,811	93,811	1,125,732	1,125,732
Surplus (Supplementals)	28,652	29,056	343,827	343,827
Total Resources	$2,972,463	$3,339,156	$35,669,559	$36,040,387
Expenditure				
Maritime	$ 170,996	$ 311,676	$ 2,055,289	$ 1,752,025
Property	259,403	330,973	3,112,492	2,786,262
Maintenance	685,415	761,800	8,226,073	7,600,708
Engineering	179,182	198,490	2,150,173	1,958,138
Finance & Administration	1,550,792	1,405,068	18,609,506	16,717,154
Total Expenditures	$2,845,788	$3,008,007	$34,153,533	$30,814,287
Difference	$ 126,675	$ 331,149	$ 1,516,026	$ 5,226,100

Source: Port of San Francisco

San Francisco Port Commission

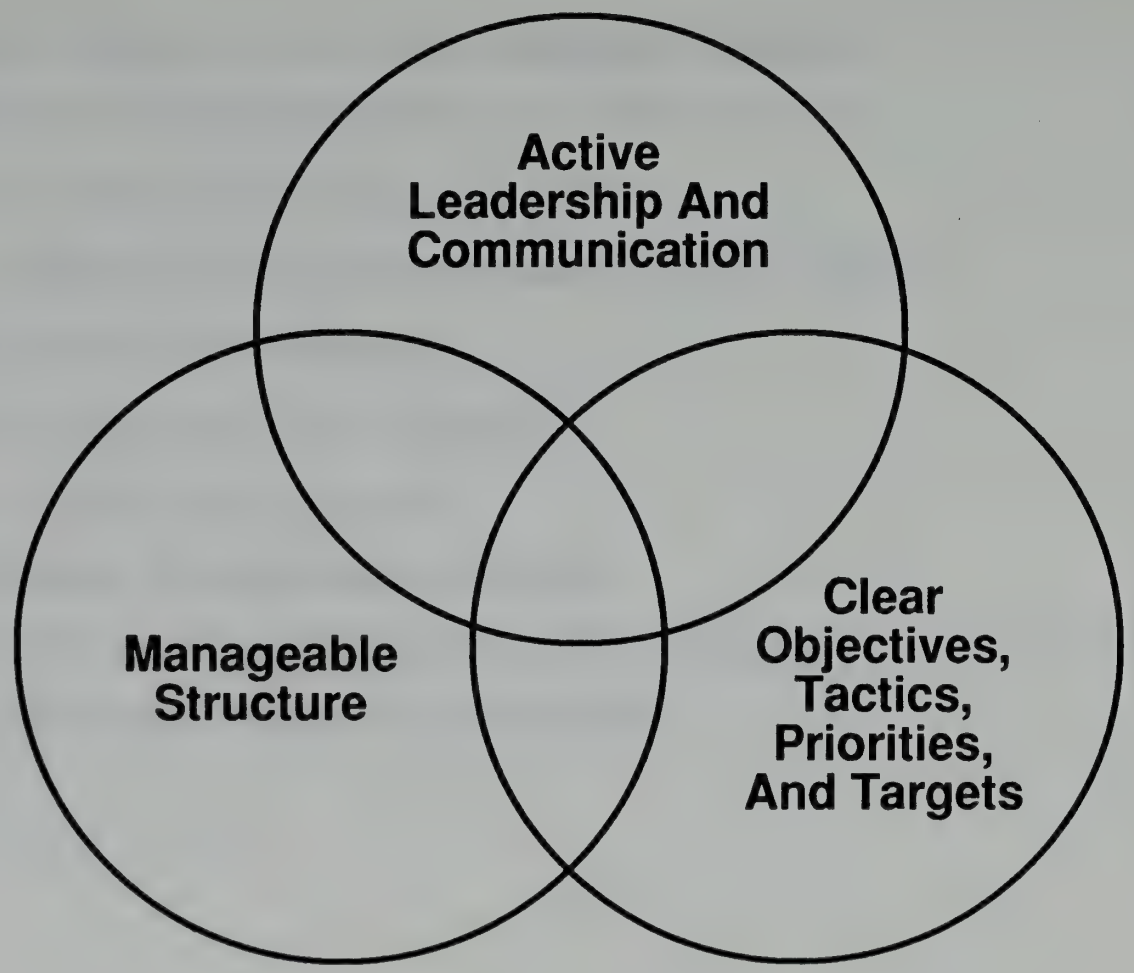
STATEMENT OF REVENUES
FOR THE PERIOD ENDED JUNE 30, 1989

	Annual Budget	Current Month Budget	Current Month Actual	Year To Date Budget	Year To Date Actual	Variance Vs. Budget Amount	Variance Vs. Budget Per Cent
Maritime							
Crane Rental	$ 1,409,000	$ 117,417	$ 151,507	$ 1,409,000	$ 1,373,424	$(35,576)	- 3%
Dockage	1,294,000	107,833	303,229	1,294,000	1,410,046	116,046	9
Wharfage	4,752,000	396,000	500,341	4,752,000	4,662,476	(89,524)	- 2
Demurrage	177,000	14,750	5,607	177,000	189,768	12,768	7
Ship Repair	2,374,000	197,833	177,364	2,374,000	2,209,791	(164,209)	- 7
Facility Rents	881,000	73,417	59,288	881,000	790,609	(90,391)	- 10
Sub-total	$10,887,000	$ 907,250	$1,197,336	$10,887,000	$10,636,114	$(250,886)	- 2%
Property							
Rent	$16,635,000	$1,386,250	$1,330,946	$16,635,000	$16,257,633	$(377,367)	- 2%
Power	906,000	75,500	49,693	906,000	876,510	(29,490)	- 3
Parking Meters	825,000	68,750	80,230	825,000	826,919	1,919	0
Parking Stalls	714,000	59,500	57,911	714,000	688,128	(25,872)	- 4
Sub-total	$19,080,000	$1,590,000	$1,518,780	$19,080,000	$18,649,190	$(430,810)	- 2%
Maintenance							
Service To Tenants	$ 100,000	$ 8,333	$ 85,432	$ 100,000	$ 108,932	$ 8,932	9%
Finance & Administration							
Interest on Investments	$ 3,708,000	$ 309,000	$ 386,494	$ 3,708,000	$ 4,460,931	$ 752,931	20%
Facility Damage	175,000	14,583	15,890	175,000	223,731	48,731	28
Penalties & Interest	50,000	4,167	2,173	50,000	42,197	(7,803)	- 16
Miscellaneous	200,000	16,667	10,184	200,000	449,733	249,733	125
Sub-Total	$ 4,133,000	$ 344,417	$ 414,741	$ 4,133,000	$ 5,176,592	$1,043,592	25%
Grand Total	$34,200,000	$2,850,000	$3,216,289	$34,200,000	$34,570,828	$ 370,828	1%

STRATEGIC INITIATIVES AND

TACTICAL IMPLEMENTATION PLANNING

Successful implementation of the strategic initiatives requires three key elements



Active leadership is needed to maintain the vision, initiate and sustain implementation efforts, and generate employee support

- Vision
  - The Port's mission, goals and strategic initiatives
  - Importance of employees and role they can play
- Initiate and sustain implementation efforts
  - Actively direct and monitor implementation progress
  - Provide impetus for change
- Employee involvement and support
  - Provide visible management
  - Demonstrate management credibility
  - Involve employees in developing and implementing recommendations
  - Recognize employee accomplishments

Developing a comprehensive and cohesive communication program will be critical for achieving acceptance of mission and goals

- Buy-in from all Port commissioners
- Holding a third Strategic Planning Advisory Panel meeting
  - Review of staff's recommendations
  - Empowering members to build consensus within their stakeholder groups
- Communicating with all Port employees
  - Nooners/info sessions
- Ensuring all other key stakeholders have been informed
  - Assign Port managers to cover each stakeholder group
  - Fully understand points of agreement and contention
- Developing a media/press program

Each Task Force will coordinate efforts in its area of responsibility

- Draft consolidated tactical plans incorporating all improvement efforts
  - Early focus on "quick wins"
  - Emphasis on service quality (internal and external)
- Clarify objectives/targets
- Execute plans
- Monitor and report progress

PROJECT SOURCES

Port of San Francisco

LIST OF INTERVIEWEES

Name	Organization
BCDC	
Allan Pendelton	BCDC
Nancy Wakeman	BCDC
Steven McAdam	BCDC
William Travis	BCDC
Other Staff (3)	BCDC
State Lands Commission	
Claire Deitrich	State Lands Commission
Jane Sekelsky	State Lands Commission
Dennis Eagan	State Lands Commission
Dianne Jones	State Lands Commission
City Government	
Art Agnos	Mayor of San Francisco
James Ho	Deputy Mayor - Business And Economic Development
Claire Denning	Metropolitan Transportation Committee
Jim Gonzalez	San Francisco Board of Supervisors
Peter Miller	San Francisco CAO's Office
Dean Macris	San Francisco City Planning
George Williams	San Francisco City Planning
Jim Jefferson	San Francisco Fire Commission

Name	Organization
Louis Turpen	San Francisco International Airport
Bob Gamble	San Francisco Redevelopment Agency
Ed Helfeld*	San Francisco Redevelopment Agency
Maritime Interests	
Walter Schrieber	COSCO Representative
Ken Sanford	Denver/Rio Grande Railroad
Robert Kleist*	Evergreen
Al Bacarri	Fisherman's Wharf Merchant Association
C. Huh	Hanjin Shipping
Eugene Swanson	Matson Freight Agencies
Hank Pouderoin	Nedlloyd
Nenon Price	NP Communications
Shigejiro Isogai	NYK Line
Louise Ingle	Port of Oakland
Warren Titus*	Seaborne Cruise Lines
Ray Holbrook	Stevedoring Services of America
Woody Williams	Southern Pacific Transportation Company
George Farosich	Southern Pacific Transportation Company
Carl Hanson*	Southwest Marine
Alejandro Stenger	Trans Maritima Mexicana
Joe Todisco	Western Rim Company, LTD.
Capt. A. Zolberg	ZIM Container Line
Barry Horowitz	ZIM Container Line

Name	Organization
Port Staff	
Michael Huerta	Executive Director
Jack Pizza	Assistant City Attorney
Jack Conrad	Commercial
Barbara Cooper	Employee Safety
Cliff Jarrard	Engineering
Walter Sequeira	Engineering
James MacFarlan	Engineering
Art Osborne	Engineering & Maintenance
Michael Janis	Executive Assistant
Rich Ayers	Finance
Ben Kutnick	Finance
Veronica Sanchez	Government/Public Affairs
Tom Gross	Government/Public Affairs
Bayerd Fong	Human Rights Commission
Maurice Edwards	Maintenance
Roger Peters	Maritime
Charlie Mitchell	Maritime
John Neudecker	Maritime
Peter Dailey	Maritime
Louise Anderson	Maritime
Ron Stone	Maritime
Denise Martinez	Maritime
Steve Amano	Personnel

Name	Organization
Paul Osmundson	Planning
Rick Wiederhorn	Planning
Dianne Artz	Property
Mike Winpress	Property
Dorothy Schimke	Property
Pat Wilson	Property
Henry Williams	Property
Kerri Lung	Property Development
Carol Brown	Seafood Center Consultant
Port Commissioners	
Doug Wong	Port Commission
James Bouskos	Port Commission
James Herman	Port Commission
Arthur Coleman	Port Commission
Anne Halstead	Port Commission
Other Experts/ Interested Parties	
Sally Germane	Association of Bay Area Governments
Michael Wilmar	Nossaman, Guthner, Knox & Elliott
Mike McGill*	Bay Area Council
Seth Bayman	Bayside Village
Luis Valencia*	Citicorp Savings
Randi Rossi	City of San Luis Obispo

Name	Organization
Steve O'Connor	Cruise Line International Association
John Lemon	Government Finance Associates
Dwight Steeves	Harvey Rose Accountancy
Tom Dorn	Harvey Rose Accountancy
Tim Reynolds	Hornblower Yachts
Martha Casey	International Council of Shopping Centers
Jay Scott	Laventhol & Horwath
Leo Fermin	Martin O'Connell Associates
Lee Eisner	Oakland Developer
Art Latno*	Pacific Telesis
Dan Flanagan	PSF Washington Lobbyist
John Miller	Public Financial Management
Dan Wallick	Public Financial Management
Shirley Kohlwes*	Red & White Fleet
Karen Alaria	San Francisco Chamber of Commerce
John Marks	San Francisco Convention & Visitors Bureau
Kent Sims	San Francisco Economic Development Corporation
Michael Nolan	The Koll Company
Redmund Kunanan	The Koll Company
Kathy Beemer	United Way of the Bay Area
Carla Anneton	Urban Land Institute
William Chang*	Westlake Care Corporation

*Strategic Planning Advisory Panel Member

Port of San Francisco

FOCUS GROUP MEMBERS

Name	Organization	Focus Group
Ruth Gravanis	Mission Creek Conservancy	Environment
Marc Holmes	Save San Francisco Bay Association	Environment
E. Clement Shute*	Shute, Mihaly, & Weinberger	Environment
Zach Cowan	Sierra Club	Environment
Pat Flanagan	Standard Fisheries	Environment
Jack Morrison*	San Francisco Tomorrow	Environment
Ted Bratz	Golden Gate Bridge Highway and Transportation District	Ferry
Terry MacRae	Hornblower Yachts	Ferry
Mark Roddin	Metropolitan Transportation Committee	Ferry
Fritz Arko	Blue and Gold Fleet	Ferry
Shirley Kohlwes*	Red & White Fleet	Ferry
Stephanie Thornton	Coastal Resource Center	Fishing
Ray Nicolai	Fisherman	Fishing
Sal Balestrieri	Fisherman's Wharf Seafoods, Inc.	Fishing
Tom Molton	Long's Fish Company	Fishing
Brian Lewis	Long's Fish Company	Fishing
Kevin McCurdy	Meatball Bait California Crayfish	Fishing
Zeke Grader*	PCFFA	Fishing
Tom Creedon	Scoma's	Fishing

Name	Organization	Focus Group
Pat Flanagan	Standard Fisheries	Fishing
Richard Lackey	Fishfinder	Fishing
Marina Secchitano	IBU	Organized Labor
Herbert Shelmandine	IBU	Organized Labor
Brian McWilliams*	ILWU	Organized Labor
Ted Wright	Local 3 - Operating Engineers	Organized Labor
Bob Clark	Local 3 - Operating Engineers	Organized Labor
Tony Sasso	Marine Engineers Benevolent Association/NWU	Organized Labor
Whitey Disley	MFOW	Organized Labor
Paul Dempster	Sailor Union of the Pacific	Organized Labor
Walt Johnson	San Francisco Labor Council	Organized Labor
Jim Eschen	California Stevedore & Ballast Co.	Marine Cargo
Robert Kleist*	Evergreen	Marine Cargo
J.R. Popham	Matson Freight Agencies	Marine Cargo
Eugene Swanson	Matson Freight Agencies	Marine Cargo
George Farosich	Southern Pacific Railroad	Marine Cargo
Sandi Lira	Stevedoring Services of America	Marine Cargo
Rai Okamoto	Arts Commissioner	Northern Waterfront
Toby Rosenblatt	Planning Commissioner (former)	Northern Waterfront
Gerald Adams	San Francisco Examiner	Northern Waterfront
Nan Roth	Telegraph Hill Dwellers	Northern Waterfront

Name	Organization	Focus Group
Rod Frebairn-Smith*	Telegraph Hill Dwellers	Northern Waterfront
Woody Stockwell	Telegraph Hill Dwellers	Northern Waterfront
Denise H. McCarthy	Telegraph Hill Neighborhood Center	Northern Waterfront
Mary Helene Lolli*	Castignola's	Retail
M.K. Veloz	Port Tenants Association	Retail
Tom Creedon	Scoma's	Retail
Peter Brown	The Anchorage	Retail
Chris Martin	The Cannery	Retail
Gary Burns	Torentino's	Retail
John Gardner	Continental Maritime	Ship Repair
Peter Blake	General Engineering and Machine Works	Ship Repair
Carl Hanson*	South West Marine	Ship Repair
David Curto	Steam Valve Machine Co., Inc.	Ship Repair
Joseph Scott	Tork Systems	Ship Repair
Bob Isaacson	Mission Creek Harbor Association	Southern Waterfront
Richard Moss	Potrero Boosters	Southern Waterfront
John DeCastro*	Potrero Boosters	Southern Waterfront

*Strategic Planning Advisory Panel Member

Port of San Francisco

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